

Virginia Wine Center

Phase 1: Concept and Opportunity Assessment

Commissioned by Albemarle County

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1. THE OPPORTUNITY

As interest grows in Virginia as a wine producing region, so does the need to provide education, professional development and capacity building to those involved in all aspects of the industry, from enologists to marketers to bloggers to chefs. Additionally, wine – and similar cultural offerings such as artisanal food, breweries, cideries, historic sites, and festivals – attract residents and tourists and build excitement for the regional brand. Now Albemarle County is exploring the development of a centralized facility to enhance the promotion of Virginia as wine destination and to contribute to additional economic development of the Commonwealth.

The development opportunity is threefold, each linked to the others to create a network of growth opportunities:

- Attract tourists and increase per person spending;
- Provide residents with a more enriching environment and build local pride, which fuel retention and growth;
- Build capacity within the wine and food industry, which will ultimately improve the quality of the visitors' experience at wineries, as well as the reach of Virginia wines.

Lord Cultural Resources was engaged by the County of Albemarle to conduct a feasibility study for a centralized facility that will support the wine industry, enhance Virginia as a wine destination, and contribute to additional economic development in the region. The feasibility study consists of two phases: 1. Opportunity Assessment and 2. Project Development and Business Plan. This report represents Phase 1 and has included the following activities:

- Background review and market data analysis;
- Case studies and data collection on wine centers;
- Site tours and market interviews;
- Presentation on key market factors and models for wine centers;
- Visioning session with sector leaders and other stakeholders;
- Two market surveys: Potential Consumers and Wine Industry Professionals;
- Concept development, including a recommended approach to visitor experience and facility needs; and
- Order of magnitude costs and potential direct revenues for the development and operation of such a center.

2. CONTEXTUAL RESEARCH: WINE CENTERS

2.1 WINE CENTER MODELS

Research of wine centers in the US and from around the world revealed four basic models, each with distinctive features, but also sometimes overlapping in terms of mission and programming. The models are as follows:

Gateway to the Region has many aspects of a traditional visitor center (i.e. state welcome centers) focused on the availability, promotion and distribution of information relevant to the region and its wine industry.

The *Education Center* model is built on a partnership with a local institution of higher learning. They either fully integrate with the university campus or maintain their own identity, but offer educational courses that are part of the university's curriculum/program. They offer wine industry relevant courses, research and certification available only to enrolled students.

Wine & Food Centers also have an important educational element, but their programming is targeted to the general public. Most host and run their own course programs (although some do collaborate with institutions of higher learning) which also tend to be broader in focus, including cooking classes and spirit and wine appreciation. These centers also host a wide array of public and private events, serving as a central social space in their community.

The *Themed Campus* model involves other dimensions such as hotels, fine dining, spas, museums, amusement areas and so on, intended to create a fun, informal and relaxed wine related experience. This model is often geared specifically towards larger groups, families and conferences; and is designed to retain visitors onsite.

The following is a bullet listed overview of the four models describing their goals, target audiences, and programming followed by a couple of examples:



1. Gateway to the Region

- **Goal:**
To attract and inform wine tourists about local wineries, wine tours, hotels, and restaurants in the region
- **Audiences:**
Tourists in general, but with particular focus on wine tourists
- **Programming:**
Limited programming with the main purpose being to act as information center, some have exhibits of local wine history and winery options in the region.

Examples:

Napa Valley Welcome Center, Napa, California

Lodi Woodbridge Wine Commission, Wine and Visitor Center, Lodi, California

2. Education Center

- **Goal:**
To promote regional wines, function as center for wine industry education and host wine retail and tasting operations.
- **Audiences:**
The wine, culinary, and hospitality and tourism industries, both professionals and students
- **Programming:**
Academic classes and continuing educational courses on wine appreciation, production and marketing. Informal courses, social events and networking.



Examples:

Robert Mondavi Institute for Wine and Food Service, UC Davis, California
 The Wine Visitor and Education Centre, Niagara College, Ontario, Canada
 National Wine Centre, University of Adelaide, South Australia, Australia

3. Wine & Food Center

- **Goal:**
 To promote regional wines and foods through diverse events and classes. (Some collaborate with institutions of higher learning.)
- **Audiences:**
 Wine and food enthusiasts, students in related wine and food industries.
- **Programming:**
 Dynamic exhibits and public events, classes in wine, spirits and food appreciation.



Examples:

Vinopolis, London, United Kingdom
 New York Wine Culinary Center, Canandaigua, New York, USA

4. Themed Campus

- **Goal:**
 To create a fun and relaxing atmosphere for discovery
- **Audiences:**
 Families and groups (i.e. friends, business meetings, conferences, seminars, amateur wine enthusiasts, school groups)
- **Programming:**
 Guided and audio guided tours of vineyards, films and exhibitions on history and wine making process. Some have spas including massage, sauna, water treatments and on-site hotel accommodation. Conference hosting.

Examples:

Loisium, Langenlois, Austria
 Le Hameau Du Vin, Romaneche-Thorins, France
 Vivanco - La Rioja, Briones, Rioja, Spain

2.2 SNAPSHOT: EXISTING AND PLANNED WINE CENTERS

Institution	Location	Size (sq ft)	Attendance	Operating Budget (USD)	Capital Cost (USD)	Governance
Education Centers						
Robert Mondavi Institute for Wine and Food Science	Davis, California, USA	129,000	n/a	\$900,000	\$91,500,000	University of California
National Wine Center	Adelaide, Australia	65,000	n/a	n/a	\$37,500,000	Owner: Southern Australian Government/Operator: Univ of Adelaide
The Wine Visitor and Education Center	Niagara, Ontario, Canada	8,500	27,500	n/a	\$3,400,000	Operated by Niagara College
Wine Science Center (in construction phase)	Richland, Washington, USA	40,000	n/a	\$3,000,000	\$23,000,000	Partnership: Washington State University & Washington wine industry
Education Center Average		60,625	27,500	1,950,000	38,850,000	
Wine & Food Centers						
New York Wine and Culinary Center	Canandaigua, New York, USA	20,000	67,000	\$3,500,000	\$7,500,000	Non-profit corporation governed by a management team that reports to an independent Board of
Vinopolis	London, United Kingdom	108,000	500,000	\$12,800,000	\$34,000,000	WineWorld London PLC
Texas Center for Wine and Culinary Arts (in planning phase)	Fredericksburg, Texas, USA	30,000	34,000	n/a	\$10,000,000	Non-profit
Centre Culturel et Touristique du Vin (in planning phase)	Bordeaux, France	140,000	425,000	\$13,200,000	\$81,600,000	Private-public partnership
Pairings, Ohio's Wine & Culinary Experience (in Phase 1 of construction)	Geneva, Ohio, USA	38,000	45,000	\$400,000	\$820,000	Non-profit
Wine and Culinary Institute (in planning phase)	Blowing Rock, North Carolina, USA	12,000	n/a	n/a	\$6,500,000	Non-profit governed by an Advisory Board & a Philanthropic Board
<i>CLOSED: Copia</i>	<i>Napa, California, USA</i>	<i>80,000</i>	<i>230,000</i>	<i>\$20,000,000</i>	<i>\$50,000,000</i>	<i>Non-profit</i>
Wine & Food Center Average (excl. Copia)		58,000	214,200	7,475,000	23,403,333	
Gateways to the Region						
Lodi-Woodbridge Wine and Visitor Center	Lodi, California, USA	8,000	30,000	\$680,000	\$200,000	Operated by Lodi Winegrape Commission
Napa Valley Welcome Center	Napa, California, USA	2,400	150,000	n/a	n/a	Non-profit (run by Visit Napa Valley tourism marketing)
Gateway Average		5,200	90,000	680,000	200,000	
Themed Campuses						
Le Hameau Du Vin	Romaneche-Thorins, France	108,000	100,000	n/a	\$5,000,000	Private
Loisium	Langenlois, Austria	13,200	100,000	\$1,730,000	\$12,000,000	Private
Dinastia Vivanco - La Rioja	Briones, Rioja, Spain	97,000	150,000	n/a	n/a	Private
Campus Average		72,733	116,667	1,730,000	8,500,000	
Average All (excl. Copia)		54,607	148,045	4,526,250	24,078,462	
Median All (excl. Copia)		38,000	100,000	2,365,000	10,000,000	

2.3 SNAPSHOT: ATTRIBUTES / PROGRAM AREAS OF EXISTING AND PLANNED WINE CENTERS

Institution	Location	Restaurant	Conference Facilities	Winery Presence	Demo Vineyard	Exhibits	Public Programs	Retail	Academic Programs (own)	Academic Programs (w/ partner)	Industry Events	Membership Program
Education Center												
Robert Mondavi Institute for Wine and Food Science at UC Davis	Davis, California, USA			X	X		X		X		X	
National Wine Centre	Adelaide, Australia	X				X	X	X		X		
The Wine Visitor and Education Centre	Niagara, Ontario, Canada			X	X		X	X		X	X	
Wine Science Center (in construction phase)	Richland, Washington,		X	X	X					X	X	
Wine & Food Center												
New York Wine and Culinary Center	Canandaigua, New York, USA	X		X			X	X	X		X	
Vinopolis	London, United Kingdom	X	X				X	X	X		X	
Texas Center for Wine and Culinary Arts (in planning phase)	Fredericksburg, Texas, USA	X	X				X	X	X	X	X	
Centre Culturel et Touristique du Vin (in planning phase)	Bordeaux, France	X	X	X		X	X	X			X	
Pairings - Ohio's Wine & Culinary Experience (in Phase 1 of construction)	Geneva, Ohio, USA	X		X	X		X	X	X	X	X	
Wine and Culinary Institute (in planning phase)	Blowing Rock, North Carolina, USA	X	X	X		X	X	X		X	X	
<i>CLOSED: Copia</i>	<i>Napa, California, USA</i>	X	X	X	X	X	X	X	X	X	X	X
Gateway to the Region												
Lodi-Woodbridge Wine Commission, Wine and Visitor Center	Lodi, California, USA	X		X	X		X	X				X
Napa Valley Welcome Center	Napa, California, USA					X		X				
Themed Campus												
Le Hameau Du Vin	Romaneche-Thorins, France	X		X	X	X	X	X				
Loisium	Langenlois, Austria	X	X	X	X	X	X	X			X	
Dinastia Vivanco - La Rioja	Briones, Rioja, Spain	X	X	X	X	X	X	X			X	

2.4 CASE STUDIES

A. LOCA: Lodi, California

Lodi's Emergence as a Wine Region

Located in California's famed San Joaquin Valley and situated on Highway 12 connecting it to Napa, Sonoma, and the Bay Area—Lodi has been able to leverage its long history of grape and agricultural production to a growing tourism and wine industry. Grapes were always part of the local landscape, growing wild dangling from the trees along the riverbanks. In 1852, the first major vineyard was established by George West, a 49'er turned businessman.

By the late 1880's farmers began focusing on grapes. Several different varieties did well in Lodi, but Zinfandel and Tokay stood out above the rest. Farmers especially embraced the Tokay, a versatile table grape with an eye-catching flame color. It was only in Lodi, with its sandy soils and cool delta breezes, that the Tokay would develop its distinctive flame color laying the foundation for what would eventually become the Lodi Appellation (established 1986).

Just after the turn of the century, vineyard development thrived, shipping companies emerged, and wineries slowly began sprouting up in the Lodi area. The once struggling farmers prospered, and in 1901 the local newspaper declared that wine production was "the coming industry for this part of the state." With the enactment of Prohibition in 1919 the demand for wine grapes actually increased as winemaking was permitted under the Volstead Act and thousands of railcars left Lodi each harvest full of winegrapes.

Throughout the 40's and 50's Lodi prospered with their Tokays, Zinfandels, and dessert wines, but then in the 1960's consumer tastes began to change. 17 million Americans supported Cesar Chavez's two yearlong boycott of table grapes and table wine was popularized by E. & J. Gallo from nearby Modesto. Lodi growers began focusing on producing quality varietal wine grapes and thousands of acres of grapes converted into premium varietal winegrapes. Wineries throughout the state turned to Lodi to supply the growing demand for delicious affordable table wines.

The area's transition to premium wines got a credibility boost when the Lodi Appellation (American Viticulture Area) was approved in 1986. Wineries were now able to label their wines with Lodi listed as the grapes' origin. Lodi was no longer the wine industry's best kept secret as awareness slowly began to build for the distinctive quality of Lodi wines. At first only a handful of small local vintners produced a "Lodi" designated wine, but as the quality and the



reputation spread, wineries across the state proudly proclaimed “Lodi” on their wine label. In 1991 local growers voted to fund the Lodi Winegrape Commission to market the region and its wines, develop grower education programs and commission viticultural research.

Today, Lodi is the “Zinfandel Capital of the World”, home to nearly 80 wineries (from only 8 in the 1990’s), hundreds of “Lodi” labeled wines, and approximately 100,000 acres of premium winegrapes. Growers and vintners combine the best of tradition with the most modern advances of science and technology—with UC Davis, the leading research center for viticulture and enology less than 60 miles away. It has been on the leading edge sustainable viticulture practices, preserving the land for generations to come.

Lodi as a Destination

The Lodi Winegrape Commission, Visit Lodi! Conference and Visitors Bureau, and local businesses have worked to promote the wineries and the region as a destination for wine, food, nature and entertainment. Key activities include:

- **Wine:** A wine trail has been established and marketed to help connect visitors to the many wineries and tasting rooms in the region. The largest concentration being in downtown Lodi. Three large events are held each year to highlight wine and grapes in the region—The Lodi Grape Festival (September), Spring Wine Show (April/May), and Zinfest (late May).
- **Food:** Area farms and agriculture are part of the Lodi experience with several farm stands that sell fresh produce and baked goods as well as serving breakfast and lunch. A farmers market is held each Thursday night from June through September and the Taste of Lodi hosted each September as California Wine Month.
- **Nature:** Located on the Great American Flyway, Lodi’s natural areas are popular for birders. The Sandhill Crane Festival is held each November. Recreation opportunities are also plentiful with Lodi Lake and many rivers offering kayaking; and the scenic country roads providing cyclists with many opportunities. Lodi also has a parachute center that offers sky diving.
- **Entertainment:** In the summer the wineries host a summer concert series and offer a range of special events. However, there is much controversy non-winery uses and the associated noise, traffic, and parking challenges and steps are being taken to limit events use of the winery properties.



The Wine & Visitor Center

Located on the grounds of Wine and Roses Hotel, Restaurant, and Spa the Lodi Wine & Visitor Center features a tasting bar featuring a wide selection of regional wines, educational demonstration vineyard on grape growing and a gift shop featuring handcrafted products and Lodi giftware. Open 10:00am – 5:00pm daily.

The location of the Center, likely limits its effectiveness, as it is not located on the major roads leading to town or in the central business district. For example, Michael David Winery, the most well known of Lodi wineries, is located a short distance from Interstate 5 on Highway 12 and is most likely people' first stop when visiting the region. The LOCA app, serves as a virtual visitor center and is available for iphones and android.

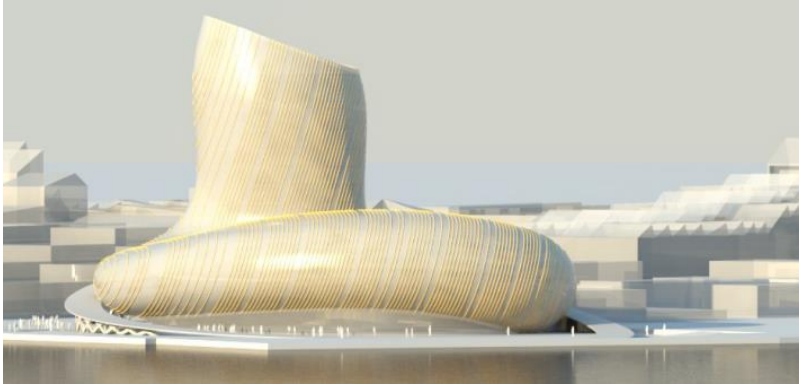
The impact of the visitor center has been minimal; in all fairness it was conceived of and opened just before the Smartphone revolution. Also, new wineries and tasting rooms open regularly, each one raising the bar. Today, the Wine & Visitor Center is one of the smaller and more modest offerings in the region.

B. Bordeaux, France

Introduced to the region by the Romans sometime in the first century, wine has been produced in Bordeaux for millennia. Its success is in large part due to the excellent environment and geological foundation for growing vines. The largest wine growing area in France with more than 8,500 producers spread out over 120,000 hectares and an average vintage of over 700 million bottles of Bordeaux wine making it is safe to say that the Bordeaux wine region is a wine juggernaut.



In collaboration with both public and private partners the City of Bordeaux is planning the *Centre Culturel et Touristique du Vin* (CCTV) a cultural tourism center aimed at transmitting the values and heritage of the wine, its production and assert the city as the cultural capital of wine.



As the cultural anchor in a larger redevelopment effort of the city district of *Bassins a flot* – Bordeaux’s old industrial port – the center hopes to enrich the existing tourist offer to help extend the length of stay and attract new visitors while also promote the local wineries in the region.

The CCTV will focus on 5 pillars of programmatic engagement:

1. Public discovery of the history and universality of wine and wine-making through historical, geographical, technological, economic, sociological and cultural components of wine and by providing access to literary, photographic, musical and cinematic records related to viticulture.
2. Reveal the links between wine and the arts by promoting contemporary culture, arts and creativity around wine.
3. Raising public awareness of contemporary social issues related to the world of wine by presenting current studies and debates on wine-related social, economic, environmental and public health facts.
4. Share the art of living and conviviality surrounding wine by educating the senses, introducing the art of living through the complexity and diversity of wines.
5. Educate for responsible consumption through generating awareness of the dangers of excessive consumption of wine.

The CCTV is positioning itself as a place to live and experience firsthand with a vocation for culture and tourism; a journey of discovery of the world of wine and the relationship between wine and civilizations.

The center will include a multisensory tasting room, an auditorium, restaurants, wine bars, shops dedicated to wines and regional products. It will host major national exhibitions, conferences, film screenings and an information space that will promote wine tourism to vineyards in Bordeaux and Aquitaine.

It is estimated that the average visit time of the center will be at half a day with an expected annual attendance of 425,000 visitors to the permanent exhibition and approximately 600,000 visitors to the whole center with all its amenities. The Center is schedule to open in 2016 with an annual operating budget of \$13.2M.

C. COPIA: Lessons Learned

The American Center for Wine, Food and the Arts was a wine, food and arts themed museum and education center in Napa, CA. Opened in 2001, it closed its doors in 2008 after filing for bankruptcy.

The center was the brainchild of Robert and Margrit Mondavi in collaboration with other leaders and institutions in the wine industry. The Mondavis provided much of the early funding for the 12 acre campus and 80,000 sq ft building that included 13,000 sq ft of gallery space, a 260 seat theater, rare-books library, a 74-seat demonstration kitchen, 700-seat outdoor concert terrace, a café and a museum gift shop.



In the end COPIA fell far short of attracting the projected 300,000 admissions in annual attendance due to poor/mixed reviews and lack of local community support for the project. Consequently, continually operating in the red since its opening COPIA closed due to an unsustainable debt burden of over \$80M USD (including \$78M in municipal bonds). Their last 990 tax form showed an annual operating deficit of \$12M in their final year of operations.

The future of COPIA, its property and facilities is currently undecided.

Key Lessons Learned:

- A sustainable cultural organization cannot afford to carry significant debt in its operating budget.
- Support from the local community is vital.
- A clear programmatic identity is vital. (COPIA's mission to include the arts drove up costs and clouded mission).
- Building size and operating budget must be right sized to ensure long term sustainability.

3. PRELIMINARY MARKET ANALYSIS

This chapter considers available data and interview feedback regarding potential resident and tourist markets for the proposed Virginia Wine Center in Albemarle County. The analysis emerges very much from a comparison of data regarding the profiles of residents and tourists with data regarding the profiles of persons who take wine tours. The market analysis is preliminary because it is subject to modification in the second phase of this study based on an additional scope of work.

3.1 OVERVIEW OF RESIDENT MARKET DATA

The following table compares key demographic and socioeconomic data for the City, County and the Metropolitan Statistical Area (MSA) compared to the state average. Some implications to the Wine Center are set out here with more in the context of comparison to the market for winery tours later in this chapter. Among key findings are the following points:

- **Population Size is Limited:** The County population of about 100,000 is relatively small, with modest growth projections. This confirms the importance of appeal to a variety of tourist market segments more likely to be interested in wine tours.
- **University of Virginia Market is Important:** City Data are influenced by the UVA student population, which skews younger, and with lower income levels. A key issue for a Wine Center is that the drinking age of 21 excludes most undergraduates from attending legally. The University market will not be as strong as it might be with a lower legal drinking age. However, parents of UVA students visiting their children would be a potentially strong market segment.
- **County Education and Income Levels are Higher than State Average:** These are positive indicators for cultural attendance in general that should translate to visits to a Wine Center that offers heritage and educational opportunities.
- **Married County Residents Less Likely to Have Children at Home:** Although this report includes strategies to encourage families to attend a Wine Center with children the reality is that adults tend not to attend tastings and winery tours with children. The higher percentage without children is a positive indicator.

Demographic and Socioeconomic Profiles	Charlottesville City	Abermarle County	Charlottesville MSA	Virginia
Population 2010 Census	43,575	98,970	201,559	8,001,024
Population Projection 2018	43,717	110,027	217,771	8,670,354
Average Household Size 2013	2.30	2.41	2.42	2.54
Race/Ethnicity: Non-White Population	38.9%	19.4%	21.0%	31.4%
Median Household Income	\$42,368	\$66,737	\$57,812	\$64,221
Average Household Income	\$60,666	\$95,119	\$80,640	\$86,155
Gender:- Male	48.1%	47.90%	47.9%	49.1%
Household Composition: Married Couple No Children	39.5%	45.7%	45.4%	41.2%
Median Age	28.7	38.5	37.1	37.7
Education(25+):Bachelor's Degree or Higher	N/A	44.7%	40.5%	34.2%
<i>Source: Research 360, 2013</i>				



3.2 OVERVIEW OF TOURIST MARKET DATA

Interviews and the FY2013 Marketing Plan of the Charlottesville Albemarle Convention and Visitor Bureau helps to profile existing tourist markets for the County. Among the key findings and potential implications for a Wine Center are the following points.

- Purpose of Trip:** Over half of all visitors to the County do so to visit friends or family. This suggests the importance of the resident market because visitors are often directed to or accompanied by the residents to local attractions. This suggests the need for the Wine Center to reflect the heritage of Virginia, and Central Virginia is particular if the Center is to be seen to offer educational as well as tourism value. The mountains are a tourism

strength that helps to explain why the Carter Mountain Orchards reported that 50% of visitors are from the Richmond area. Also of note is that Charlottesville ranks second only to Charleston as a destination wedding venue. Vineyard weddings are growing in popularity.

- **Origin of Visitors:** The target markets identified by the Charlottesville Albemarle Convention and Visitor Bureau reflect market segments already most likely to attend because of proximity. These are Washington DC (23% of total tourist visitors) and Other Virginia, especially Richmond (21%).
- **Length of Stay:** It is less than two nights. The Marketing Plan highlights a trend to shorter value-added trips that predate the recession and higher gasoline prices. ***A central objective of the Marketing Plan is to increase length of stay. Interviews in this study indicated that a Wine Center successful in encouraging more tourists to go to wineries would help to boost length of stay in the County and therefore contribute to increased economic development, hotel room nights and the taxes on them.*** There are 3,200 hotel rooms in Charlottesville, which is considered to be inadequate, with 500-600 more being added in the next 3-5 years.
- **Peak Tourism Seasons:** These are spring and fall for flowers, foliage, wine harvest, University of Virginia graduation, major sports and music events, school tours, as well as during the Thanksgiving and Christmas holiday period. Monticello has higher visitation in the summer. The low season is in winter despite the Wintergreen Ski Resort. An objective of the Marketing Plan is “no off-season” and thus to extend the tourist season in the slower months. This confirms the need for the Wine Center to operate on a year-round basis.
- **Profile of Visitors:** On a statewide basis the tourism market is middle to upper middle income individuals between 25 and 45 who hold a bachelor’s degree or higher and are traveling with children for short getaways to enjoy recreation and scenery. The market for Charlottesville/Albemarle “trends slightly older (35-55 years old) and includes more couples coming without children.” (FY2013 Marketing Plan). As seen later in this chapter, the profile of Charlottesville/Albemarle tourist visitors aligns very closely with the profile of wine tourists.
- **Mode of Transportation:** Over 75% of tourists arrive by automobile. It is 103 miles from Dulles and 111 miles from Reagan National airports and a 7 hour train ride from New York. Although air links are considered poor interviews indicated that the number of flights to and from the Charlottesville Albemarle Airport has increased in recent years and will continue to do so with the extension of the runway and because of greater demand.
- **The University of Virginia is a Major Generator of Tourist Visits:** Data highlighted in the Marketing Plan include the following points:
 - University of Virginia has 21,000 students
 - It has a large alumni network
 - 30,000 people attend Finals Weekends
 - 4,500 alumni and family members attend Reunions Weekend
- **The Marketing Plan lists the following attractions and events that draw tourists:**
 - Festival of the Book
 - Virginia Film Festival
 - Look3 Festival of the Photograph
 - Foxfield Races
 - Monticello Wine Trail
 - Heritage Harvest Festival

- Charlottesville Ten Miler
- Wintergreen Ski Resort
- Shenandoah National Park
- Blue Ridge Parkway
- Monticello
- University of Virginia
- Charlottesville Downtown Mall
- Fridays After Five
- First Fridays
- Monticello Artisan Trail

Noteworthy is the **prominence of Monticello as the primary attraction in the region**. It attracts some 450,000 visitors per year. In addition, there are 136,000 using the Saunders-Monticello Trail (walking, running, biking). Monticello is of particular importance because all three sites for the Wine Center under consideration are either on Monticello property or near it. Peak attendance months in 2012, 2011 and 2010 were April, July (Independence Day), May and June. Low months are January, February and December.

3.3 WINE TRAVELERS TO VIRGINIA

TNS Travels America conducted a survey of tourist visitors to Virginia in 2012, having defined tourists as 50 miles one-way from home. The total sample size was 3,270. Among respondents were 64 persons who reported including the activity of wine tasting/winery tour in Virginia. ***This represents only 1.9% of tourists who took part in wine tours and tastings, which is surprisingly low, and if correct confirms an opportunity for the Wine Center to help boost wine tourism in Virginia.***



A review of the profile data for wine tourists compared to the overall profile of tourists to Virginia indicated some surprises but the wine tourist sample size is far too small and is not statistically reliable so no conclusions are drawn from the data.

3.4 THE MARKET FOR MONTICELLO

The following data are from an ongoing visitor experience survey at Monticello that reflects responses from July 2011 through September 2013 and represents information from over 14,000 survey respondents. Among the key findings and some implications to a Wine Center are as follows:

- **Guest Experience Metrics Are Very Positive:** Overall satisfaction levels are Excellent: 81.0%, Good: 17.5%; Fair: 1.2%, Poor: 0.2%, Very Poor: 0.1%. Some 96.2% of visitors are likely to recommend Monticello to others.
- **The Travelling Party is Primarily Adults without Children:** Visitors to Monticello are primarily adults (71.7%) with families at 28.3%, of which 18.5% were with children under 11 and 9.8% with only teens age 12+. About 61% of visitors are aged 50 plus. ***The profile of***

Monticello visitors is thus very similar to the largely adult market that will attend a Wine Center.

- **High Income and Education Visitors:** Of particular note is that 43% of visitors have post-graduate degrees. This is also the profile of wine tourists, as discussed below.
- **Repeat Visitation Levels are Relatively Low:** First time visitor account for 61% of all visitors with repeat visitors at 39%. The last visit for repeat visitors was many years ago in most cases. (Within a year 14%; 1 – 3 years 16%; 4 – 9 years 19%; 10 – 20 years 27%; 20+ years: 25%). *A Wine Center offering tastings should have a high degree of repeat visitation, which would be positive for a nearby Monticello.*
- **Few International Visitors:** Despite the world-wide recognition of Thomas Jefferson only 2% of Monticello visitors are international. As shown *later a Wine Center should help to draw more international visitors, especially those who are in Washington DC.*

3.5 PROFILE OF VISITORS TO HERITAGE HARVEST FESTIVAL AT MONTICELLO

Some 6,626 visitors attended the Heritage Harvest Festival over a 2-day period (September 6-7) in 2012, of which 71% were from within Virginia. Among Virginian some 65% were from central Virginia. Attendance declined to 5,679 in 2013, of which 67% were from within Virginia. A survey of Heritage Harvest Festival Visitors in 2012 and 2013 found that about 70% are first time visitors, 28% 2-4 time visitors and 1-2% attended 5 or more times and that 22-28% of visitors had never attended Monticello. *The Harvest Festival therefore helps to boost attendance by regional residents who have "been there, done that" at Monticello. The Festival emphasizes the ability to attract new visitors to Monticello of other visitor experiences and the potentially positive role of a Wine Center.*



3.6 PROFILE OF VISITORS TO MONTICELLO WINE FESTIVAL

The Monticello Wine Festival is held at the 3,200 seat NT Wireless Pavilion and attracts about 2,000 paid admissions. It features 28 wineries who initially offered wines to the festival without charge, and which are responsible for the sales of wines on site. Admission charges are \$35 for most visitors and \$75 for a capped 250 VIP visitors who have access to higher quality, award winning wines, free parking and food. Some 35-40% of those who attend are from outside the county. *Clearly given the large number of attendees it would not be possible for the Monticello Wine Festival to be located at a relatively small Virginia Wine Center.*

Noteworthy, however, is that despite free lectures on wine and food pairings and other educational programs few attend. The focus of those attending is drinking a variety of wines.

3.7 SURVEY OF INTERNATIONAL WINERIES REGARDING WINE TOURISM

An undated survey conducted by the Great Wine Capitals Global Network included a sample of 454 member wineries around the world that are open to visitors. Key data include the following points, along with some potential implications to the proposed Virginia Wine Center, with more discussion later in this chapter when a comparison is made of the profiles of residents of and tourists to Albemarle County with the profile of wine tourists:

- **Origin:** About 29% of visitors are local, 37% are from elsewhere in the country and 34% are foreign tourists. In France some 39% of wine tourists are from foreign countries. The ability of a Virginia Wine Center to attract more international tourists would be very positive for the economy of the region.
- **Gender:** Some 55% are male and 45% are female. This contrasts with the profile of most cultural institutions in which females account for the larger percentage of visitors.
- **Age and party visitor party composition:** About 45% of visitors are in the 36 to 55 age category, with about 30% aged 56 or older and 25% aged 18-35. Visitors are thus arriving primarily as couples or singles or adult groups without children. The average age of wine tourists in France is 46. The party composition of wine tourists in France is primarily couples (43%), then families (26%), friends groups (22%) then singles (9%). Similarly, the wine tourist market in Australia is profiled as "couples with no children and those with higher education and incomes in professional occupations." (South Australian Tourism Commission, 1997). *The aspect of wine tourists as primarily couples suggests a potential tie-in to the very well known "Virginia is for Lovers" marketing of the state once a Wine Center is established that encourages visits to wineries.*
- **Seasonality of visits:** Over 70% of respondents reported the summer as the peak visitation period, 15% in the fall, 8% in the spring and 3% in the winter, while 4% reported no difference by season. The winter season will also be a challenge for a Virginia Wine Center but with an objective to widen the tourism season it should help.
- **Promotion of wine tourism:** The highest rated response was Tourist Information Office (68%), which may or may not include Wine Visitor Centers, followed by Wine Tasting Events (64%), Mailing/Newsletter (61%), Participation in Wine Fairs (52%), with a variety of other methods at less than 50%.
- **Activities/services offered to tourists:** Wine Tasting Events (83%), Guided Visits (75%), Restaurant (40%), Accommodation (29%), Cultural or Social Activities (20%), Temporary Exhibitions (17%), Museum (10%) and Spa/Wine Therapy (4%). Of particular interest are the temporary exhibitions or museums within wineries. The concept of a Wine Visitor Center is to provide some of the museum/exhibitions functions and to orient visitors to the wineries themselves.
- **Factors for attracting wine tourists:** The top rated factors are Brand Positioning (60%), Winery History (54%), Proximity to Important Area/Place (49%), Winery Services (43%), and Winery Architecture (39%). *Noteworthy is recognition that proximity to an important area or place is a significant factor in the success of winery tours. This confirms the wisdom of choosing among three sites that are at or very close to Monticello, the primary attraction in Albemarle County.*

- **Psychographics:** The psychographic profile of wine tourists in France is Epicurians (pleasure of the senses) 40%, Classicals (heritage tourists) 24%, Explorers (20%), Experts (16%)
- **Wine tourism as a revenue generator:** The bulk of income generated by wineries is from wine sales, but a very substantial 20% is reported to be from wine tourism activities.
- **Distribution channels for wines:** The highest percentage (32%) was from Direct Sales at the Winery (32%), which is higher than Restaurant/Bar/Hotel (18%) and Wine Shop (17%). The data indicate the importance of strategies to encourage people to go to wineries, including a gateway or orientation role for a Wine Center.
- **Perceived viability of wine tourism:** Some 68% said wine tourism is financially viable while 32% said it is not. The most positive responses were from wineries in Napa, Mainz, Porto, Cape Town and Bordeaux in that order. The most negative were Florence and Mendoza.



3.8 COMPARISON OF PROFILES AND ACTIVITY PATTERNS OF WINE TOURISTS WITH ALBEMARLE COUNTY TOURISTS, RESIDENTS AND VISITORS TO MONTICELLO

- **Visitor party composition:** The winery market includes relatively few children while the tourist market for Albemarle County includes lower percentage of children than the state average. Moreover, some 72% of visitors to Monticello are adults without children while some 46% of resident households in Albemarle County are married couples with no children. *A Virginia Wine Center would fit the profile of a substantial percentage of resident and tourist markets for the County.*

- **Gender:** Monticello, like most other cultural attractions, draws more women (57%) than men. Winery tours attract more men (55%) than women. *There is an opportunity for a Virginia Wine Center to help boost the appeal of the region to men and expose more of them to cultural attractions.*
- **Age:** Winery tour, Albemarle tourism and Monticello markets all skew older (35-55), so there is a *good opportunity for crossover and packaged visits to older market segments*. On the other hand research indicated the under-35 Virginia resident market was more open to purchasing Virginia wine than older persons who have a less positive image of Virginia Wine (Grow, Virginia Wine Board Research Findings, January 2012, p. 5).
- **Level of educational attainment and income:** Winery tour visitors and Monticello visitors have high levels of educational attainment and income, suggesting good crossover opportunities if there is greater appreciation of Virginia wines and travel to wineries as consequence of Virginia Wine Center.
- **Origin of visitors:** With a relatively small Albemarle County population of about 100,000, tourism is particularly important. Wineries tend to attract a substantial percentage of tourists, including international tourists (34% among 494 international wineries surveyed). Relatively few international tourists visit Monticello (2% of total, although 59% of visitors live at least 400 miles away) or the County in general but many international tourists are in Washington DC. *Attracting international tourists to a Virginia Wine Center and wineries could help to boost international travel to the region.*
- **Visitor spending:** Wine tourists tend to be high spenders while that is not particularly the case among Albemarle tourists and residents. *Attracting a larger number of higher spending tourists as a consequence of a Virginia Wine Center and enhancing appreciation of Virginia wines could be very positive for economic development.*
- **Length of visit:** The greater the length of stay the more likely the need for overnight accommodation in the County. Monticello already accounts for overnight accommodation as 53% of visitors are on site for over three hours. *The more a Virginia Wine Center encourages winery tours and adds to the visitor infrastructure the greater the length of stay in the County.*
- **Repeat visitation:** With tastings, the winery market includes a high percentage of repeat visits but tourism in the County and for Monticello (39%) is of lower than desirable repeat visitation levels. Most of the repeat for Monticello is from several years ago - only 14% of Monticello repeat visitors attend a second time in a given year. *A Virginia Wine Center could help to boost repeat visits.*
- **Activities in county:** Some 13% of Monticello visitors in 2005 also went to at least one winery. There are opportunities for a Virginia Wine Center to help increase this percentage given similarities of market profiles.
- **Substantial economic impact:** An economic impact study of the Virginia wine industry estimated about 1,618,000 wine related tourists in 2010 compared to 1,000,000 in 2005. The number of wineries grew from 129 to 193 during that period and is said to be well over 200 today.
- **Factors for success in wineries:** Wineries are often located off the beaten path in order to control costs, but that makes it more difficult for tourists to reach them, and increase marketing cost requirements. *A Virginia Wine Center should help to provide marketing benefits to wineries.*

3.9 ATTENDANCE AT MAJOR CULTURAL EXPERIENCES IN CENTRAL VIRGINIA

Major Cultural Attractions in Charlottesville Area	Attendance
Museums & Historic Houses	
Monticello, Home of Thomas Jefferson*	450,112
The Rotunda, University of Virginia*	135,000
Ash Lawn-Highland*	68,000
The Virginia Discovery Museum *	58,000
The Fralin Museum of Art at the University of Virginia*	25,000
Second Street Gallery*	15,000
Leander J. McCormick Observatory*	4,000
Sub-total Median:	58,000
Sub-total Average:	107,873
Festivals & Fairs	
Historic Garden Week in Virginia	40,000
Foxfield Steeplechase Races	25,000
Virginia Festival of the Book	24,000
Virginia Film Festival	24,000
Albemarle County Fair	10,000
First Night Virginia on New Year's Eve	8,000
Ash Lawn Opera Festival	7,000
Heritage Harvest Festival	6,000
Monticello Wine Festival (May)	2,000
Sub-total Median:	10,000
Sub-total Average:	16,222
Shenandoah National Park	1,100,000
Median:	24,000
Average:	117,712

*Source: The Official Directory 2013



3.10 CURRENT WINE, FOOD & ARTISINAL EXPERIENCES IN CENTRAL VIRGINIA

The following is a list of the current wine, food and artisanal experiences in Central Virginia from www.visitcharlottesville.org that may present opportunities for partnership, collaboration or even membership:



Orchards & Farms

- Albemarle Cider Works
- Ash Lawn-Highland, Home of President James Monroe
- Bessette Family Farm
- Best of What's Around
- Carter Mountain Orchard
- Charlottesville City Market
- Chiles Peach Orchard and Farm Market Crozet
- Forest Lakes Farmers Market
- Gryffon's Aerie Farm
- Henley's Orchard
- Meade Park Market
- Open Gate Farm
- Scottsville Farmers Market
- Sharondale Farm
- Wayland Orchard

Wineries & Breweries

- Albemarle Cider Works
- Blenheim Vineyards
- Burnley Vineyards
- Castle Hill Cider
- Champion Brewing Company
- First Colony Winery
- Glass House Winery
- Grace Estate Winery
- James River Brewing
- Jefferson Vineyards
- Keswick Vineyards
- King Family Vineyards
- Meriwether Springs Vineyard and Winery
- Monticello Wine Trail
- Moss Vineyards
- Mountfair Vineyards
- Pippin Hill Farm & Vineyard
- Pollak Vineyards
- South Street Brewery
- Starr Hill Brewery
- Stinson Vineyards
- Three Notch'd Brewing Company
- Trump Winery
- Virginia Wineworks
- White Hall Vineyards



Wine & Brewery Tours

- Blue Ridge Wine Excursions
- Arcady Vineyard Wine Tours
- C'ville Taxi
- Camryn Executive Transportation and Limousine
- First Colony Winery
- James Limousine
- JnJ Transport LLC
- Monticello Wine Festival
- Monticello Wine Trail
- Trump Winery
- Wine Tours of Virginia
- Wisdom Oak Winery
- Wish Wish



A full list of Virginia wineries is attached in *Appendix B*.

4. SUMMARY OF FINDINGS FROM MARKET RESEARCH

Market Research was conducted with stakeholders as well as the public to help define what the wine center should be and gauge support for such a project.

- An analysis of four types of operating models indicate that the most dynamic and sustainable approach would mean developing a **hybrid model** that serves both the public and the professional community of wine makers; heavy on education and a dynamic visitor experience.
- Both the Consumer Survey (sample size 703) and the Professional Survey (sample size 70) showed **overwhelming support** for the development of a Wine Center in Virginia.

4.1 VISIONING WORKSHOP

A visioning session with over 30 local leaders, including owners of wineries and high level representatives from tourism, culture and agriculture, confirmed interest in a **model that merges the most compelling elements of three models: Wine & Food Center, Education Center and Gateway to the Region.**

The most important consideration/condition for support was to **ensure that ultimately the Center build appreciation for wine and enhance visitation to wineries.** Any activities that compete with the wineries for visitors will be considered unsatisfactory.

The following notes reflect additional discussions from the workshop:

Types of support wine industry professionals would like from a Virginia Wine Center:

- Consumer education;
- Promotional support;



- Curating a variety of experiences;
- Training for tasting room staff;
- Networking;
- Wine making technique education;
- Teach people how to live;
- Cooperative events (e.g. a neutral site for an annual wine festival);
- Lecture space;
- Partnerships: Virginia Tech, University of Virginia and hospitality industry.

Elements or building blocks of a successful Virginia Wine Center:

- Marketing coordination between the Center and wineries;
- Sustainable level of funding to ensure continued success;
- Change model to a Virtual Virginia Wine Center - would strengthen sustainability and enlarge the pie (not create a new slice);
- Qualified staff/sufficient training to ensure the experience exceeds expectations;
- Involvement of Virginia farmers and wineries;
- Collaboration on programming;
- Tie back to an agricultural/culinary element;
- Educational connections that link to Jefferson and Old World information;
- Ensure Center supports wineries and doesn't compete - find a unique positioning ;
- A collaborative center (i.e. wine trails);
- Formal training and certification (through Society of Wine Educators);
- State-wine buy-in;
- Location, location, location;
- Public private partnership;
- Include elements that relates to cider, beer and spirits;
- Serve as a gateway to regional history and festivals.

Participants were asked to vote on the model they preferred. An option to veto was also offered. Below are the results (green is preferred and red is a veto).

- Gateway to the Region:
 - ● ● ● ● ● ● ● ● ● ● ● (12)
 - ● ● ● ● ● (6)
- Education Center:
 - ● ● ● ● ● ● ● ● ● ● ● (12)
- Wine and Food Center:
 - ● ● ● ● ● ● ● ● ● (9)
- Themed Campus:
 - ● ● ● ● ● ● ● ● ● (10)

Additional comments and points of discussion included:

- Ensure State buy-in; important to promote wines from throughout the State.
- The Center should be a tool to drive traffic to wineries. Sometimes this just means making people comfortable with tasting and asking questions – they *want* to know more.

- Virginia wineries have a unique promotional opportunity because many consider the region to be more beautiful than Napa.
- The experience must be dynamic – not a static exhibit of wine history.
- Accessible location is critical.
- Families are an important potential visitor segment to consider.
- Provide training: elevate standard of service, teach new techniques.
- Be a neutral site for collaborative events.
- Partnerships and collaborations should be a key part of the Center, and may include the local food industry, cideries, breweries, arts, hospitality industry, PVCC, UVA, VA Tech, local music, County Fair, VA Wine Expo, restaurants and so on.

4.2 STAKEHOLDER ENGAGEMENT: INTERVIEWS WITH KEY OPINION LEADERS

The following points emerged from interviews with key opinion leaders. Please see Appendix A for the names of those that provided input.

1. There was overwhelming support for a VA Wine Center as a new attraction for tourists and residents. *“Tourists don’t have a lot to choose from....music, food. We need something constant and consistent - not another festival.” “Folks that are not educated about wine are still interested.”*
2. Planning for the Center will require assurance that it will not be a substitute to winery visits and instead will encourage them. A concern heard at the interview process (and workshop) was that the Wine Center could be a substitute to going to the wineries.
3. Most interviewees expressed an interest in supporting the Wine Center in their own way.
 - There are ample opportunities for partnerships ranging from management services agreement(s) to co-programming to space use to product sales, and so on.
 - Assuming the Center is planned in line with their needs; industry representatives suggested that they would likely contribute funding to support programming, operations and/or promotion.
4. Most interviewees confirmed that the Center should link wine to food and include cideries, breweries and distilleries as appropriate. Expanding to include artisans and a green market were also raised for consideration.
5. Appeal to families was generally seen as natural and important. *“Big family town – you need activities for kids.” “Something has to be done to make it appealing to families. While parents taste wine, kids taste juice or cider. Let families engage and learn together.”*



6. Linking the Wine Center to Jefferson and the earliest roots of the food and wine movement was seen as a key opportunity to claim a distinctive and authentic market position. *"This is the birthplace of wine and food...Jefferson was the first foodie."* *"Jefferson is the patron saint of the American Farm."*
 - Interviewees consistently advised against including the word "heritage" in the name.
 - Some specific heritage stories that could be addressed: statewide wine history (all settlers in Jamestown required to plant vines), how Virginia grapes saved French wineries, and story of beer.
7. Interviewees expressed the need for a multi-use facility that can provide a place for the industry to come together. *"VA Governor's Cup needs a home."* *"No home for State meetings."* *"We need a facility that is consistent with the reputation of the people that are showing up - Mondavi, Steven Spurrier..."*
8. Hands-on activities and training (both for the industry and to cultivate public appreciation) were consistently cited as critical aspects of the Center. *"Training for tasting rooms...wine crush facilities."* *Hands-on: stomping grapes, manufacturing, canopy management, pumpovers, a training vineyard..."*
9. There is tension between regional and statewide benefits. Some feel strongly that the focus should be a Statewide mandate to improve the image and quality of Virginia wines; however, others want to focus on the Monticello AVA. A proposed solution is:
 - A regional gateway: local benefits are getting folks to go to wineries
 - Education that benefits the whole State: tastings and wine available from all regions of the state, with a focus on educating consumers

4.3 SURVEY OF WINE INDUSTRY PROFESSIONALS

A statewide survey for industry professionals was created with two goals in mind:

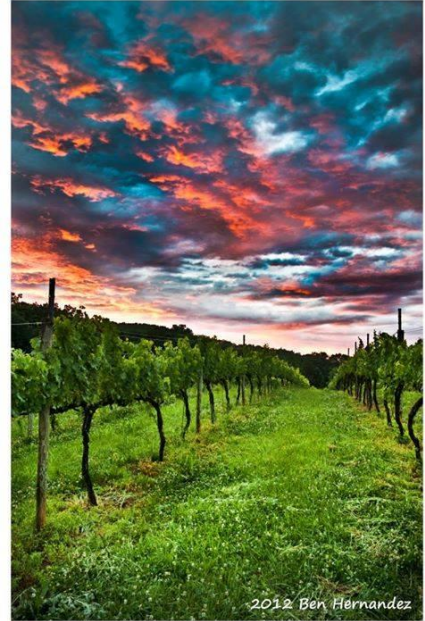
1. Gather preliminary perspectives on how a Wine Center could support VA wine, cider, beer and food industries; and
2. Identify the most compelling elements of a VA Wine Center from the perspective of industry insiders.



Target survey takers were wine, beer and artisanal food professionals working in VA and over 21 years of age.

The survey was answered by 70 industry professionals. Responses were positive and constructive, and indicated support for the Center provided it is responsive to industry needs. Topline results are below and the full survey report is attached as Appendix D.

- 60% of sector leaders confirmed that they would use the Center as a professional resource, with 67% willing to send employees for classes.
- 70% would be willing to collaborate on the development of programming.
- 84% believe that classes in partnership with an academic institution are a “must have” (18%), “Important” (45%) or “Somewhat Important” (21%).
- The majority did not see the Center as a threat to their business: 56% do not feel that the Center would compete with their business. Only 12% are concerned that the Center would “Definitely” compete.
- 85% feel that a sales outlet is at least somewhat important.
- The top 5 activities that should be offered to public are:
 1. Tastings of wine, cider, beer and food (83% rated as “Must Have” or Important”)
 2. Exhibition about VA’s wine history (83%)
 3. Formal classes/workshops to inspire and build appreciation (75%)
 4. Opportunities to buy local wine, beer, cider and food (75%)
 5. Demonstrations and interactive activities (66%)



4.4 SURVEY OF POTENTIAL CONSUMERS

A statewide survey for cultural consumers was created with three goals in mind:

1. Gauge interest in VA wine, cider, beer and food;
2. Gauge interest in visiting a Center dedicated to VA wine and cider;
3. Identify the most compelling elements of a VA Wine Center from the perspective of the general market.

Target survey takers were existing cultural consumers, defined and screened based on the following criteria:

- Must be residents and tourists to VA that have visited:
 1. Existing wine trails, breweries, cideries and/or farms; or
 2. Museums, artisan centers and design centers; or
 3. High profile festivals held in VA
- Must be over 21

Responses to the survey were extremely positive, both in terms of interest in visiting a VA Wine Center; and in the number of responses to the survey (a robust sample size of 703). Topline results are below and the full survey report is attached as Appendix C.

- 96% of respondents confirmed that they are “Very Interested” or “Interested” in learning more about wines from VA.
- 69% would “Definitely” visit a VA Wine Center and 22% would “Probably Visit” (no location specified). This number remains stable if the Center were to be located in Central VA.
- 77% would be “Very Interested” or “Interested” in taking a shuttle to multiple vineyards.
- 92% report that they would “Probably” or “Definitely” purchase wine, beer or cider on site; and 86% would likely purchase specialty food.
- Consumers were of two minds on children: 38% would “Definitely” or “Probably” bring their children, while 43% would “Probably Not” or “Definitely Not.”
- 62% would “Definitely” or “Probably” purchase tickets to “Special events like festivals, dinners and celebrity talks.”

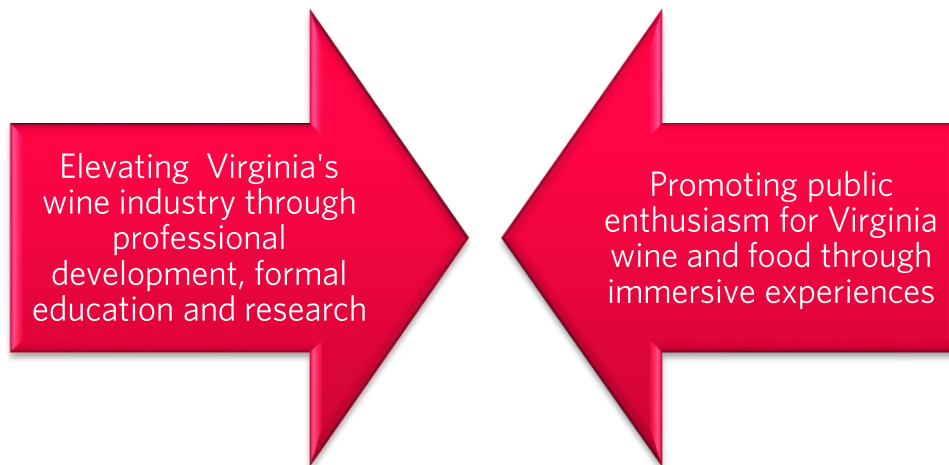


5. CONCEPT FOR VIRGINIA WINE CENTER

5.1 GUIDING PRINCIPLES

The following principles form the foundation for concept development:

- **A dual mandate:** The Virginia Wine Center will serve both the general public and wine professionals; sometimes with overlapping programs that bring the two together.



- **The first but not necessarily the only wine center in Virginia:** Although described as the Virginia Wine Center, there is no intent to claim that it should always be the only wine center in the Commonwealth. There are reported plans for a wine center in Loudon County that would focus on the business of winemaking, and would appropriately be a gateway to wineries in its region.
- **Ensuring statewide benefits to the Virginia wine industry:** A key issue is the role the Center will play in promoting the wine industry statewide. If the Virginia wine industry does not produce enough grapes to be able to export and a substantial part of the revenues generated are from people touring the wineries and making purchases on site, a fundamental question in this study is how a Virginia Wine Center can help the industry. Key elements of the concept relate to the need for the Virginia Wine Center to offer both statewide and regional benefits:

- A “concierge” approach that provides orientation to all wineries. Although the gateway benefits are more likely to be regional, there will be statewide benefits as well. For example, persons on their way to the Washington DC area could choose to visit wineries in Loudon County as a consequence of attending the Virginia Wine Center in Albemarle County.
- Educating visitors about the heritage of Virginia wines, back to the Jamestown settlement when each settler was encouraged to plant 10 acres of grapes; through the important role of Thomas Jefferson and how Virginia grapes saved the wine industry of France.
- Deepening public appreciation and enthusiasm for the art and science of winemaking.
- **Partnering to deliver formal education:** The Wine Center in Albemarle County will have an educational mandate, which it will most likely carry out in partnership with PVCC, which already offers viticulture and enology programs, and perhaps others as well.
- **Family-friendly image:** Most visitor parties to American wineries do not include children, (although the “Themed Campus” models found in Europe are often family friendly as are the cultural events at wineries in Mendoza). The public survey for the Virginia Wine Center confirmed significant interest in visiting with the whole family. The Virginia Wine Center may attract a family market with hands-on interactive opportunities associated with vine cultivation, wine production, grape and juice tasting, and other immersive programs and festivals that are more broadly focused on food, music and culture. A greater child focus than what is offered by the wineries not only helps to distinguish the Wine Center, it also helps to overcome weaknesses in the profiles of Monticello and Albemarle County visitors.
- **Phased development, focusing first on the Wine Center:** There are opportunities for a Wine Center to be paired with a public market, or a more substantial focus on food and the products of regional artisans. Given the capital and operating cost implications of a larger facility it is assumed that these and other options be considered as part of a future phase of development once the Wine Center has an experience record.¹

5.2 PRELIMINARY MISSION

The Virginia Wine Center promotes the distinctive wine and food of Virginia. Our Center brings the art, science, and history of Virginia wine to life for the enjoyment of the public, and strengthens Virginia’s wine making community through professional development and research.

¹ The idea of a public market with permanent stalls for high end food and artisan opportunities was proposed as part of the interview process and cited was a successful example at the Oxbow site in Napa, California. However that site is downtown and has access to downtown residents, office workers and shoppers on a daily basis. The sites under consideration for the Virginia Wine Center are not downtown and a daily operation would appear to be very risky from the outset and would divert available capital resources from the Wine Center.

5.3 VISITOR EXPERIENCE OVERVIEW

The chart below provides an overview of the visitor experience model. Phase 2 of the study will provide a more detailed explanation of each program and how it may be implemented.



5.4 GOVERNANCE

The Center is recommended to be governed by a not-for-profit 501 (c) 3 capable of offering tax receipts for donations. It is recommended that a majority of Board members be from the Virginia Wine Board to encourage collaboration and funding from both the wine industry and government.

The 501 (c) 3 would either operate the Center or ideally enter into a management services agreement with the Monticello Foundation intended to limit the Center's staffing costs and take advantage of the expertise of Monticello senior management. However, since Monticello also seeks to raise private funds, it is recommended that Monticello operate with its own Development Director.

Similarly, it is recommended that education programming (formal, informal, professional, and even some public programming) be done in partnership with Piedmont Valley Community College and/or other potential academic partners that could include UVA, Virginia Tech, UC Davis, culinary institutes and so on.

Details and financial aspects associated with a management services agreement and programming partnerships need to be determined through more discussion and negotiation in Phase 2 of this study.

6. PRELIMINARY SITE AND FACILITY ANALYSIS

The primary objective of the proposed Virginia Wine Center is to strengthen the Virginia wine industry. The site evaluation and facility plan set out here seek to help achieve this objective. To do so requires the site and facilities to be planned to help boost attendance and revenue and to control costs, both capital and operating. The analyses here are subject to modification as part of more detailed planning in the second phase of this study and are thus considered preliminary.

6.1 SITE EVALUATION

The three sites identified for consideration as the location of the Virginia Wine Center are in the same general vicinity at or near Monticello lands but there are differences that help to distinguish them and lead to a ranking. The three sites are briefly described in alphabetical order according to their common names as follows:

- **PVCC Site:** This site is part of the Piedmont Virginia Community College campus on Route 250 and very close to Interstate 64. The specific site is about two acres in size without loss of trees and would share a parking lot with the 10,000 sf Stultz Center for Business and Career Development. That building was used as the Charlottesville-Albemarle Visitor Center before the Center was relocated to downtown Charlottesville. Since 2008 the College has offered viticulture and enology courses which have grown to include about 75-100 unique students per year.
- **Shadwell Site:** This 213-acre site associated with the birthplace of Thomas Jefferson is part of the 2,500 acre property owned and operated by the Monticello Foundation. Jefferson established a small vineyard at Monticello and was an early advocate for the development of an American wine industry. The Shadwell site fronts Route 250 and is less than a mile from the Interstate 64 an/off ramp. The site is largely vacant and partially used as a cow pasture.

- **Tufton Site:** This is a 561 acre site, with cleared land at 227 acres adjacent to the 633 acre Monticello Farm Tract. The property abuts Route 53 (Thomas Jefferson Parkway) and is further away from Route 250 or I-64 but closer to the Monticello Visitor Center. The Monticello Foundation would like to develop the Tufton site for purposes of telling more of the agricultural story of Jefferson and Monticello. The site already features an existing house and barn associated with the Center for Historic Plants already in place and there is a preliminary plan for the Tufton site to become the Center for Sustainable Agriculture in the future.

Evaluation Criteria and Weightings

The following table indicates site evaluation criteria and weightings that were used to compare the three site options. Seven criteria for which there are differences among the three sites are considered. The sites are roughly the same distance from Charlottesville and area wineries so availability, proximity to major attractions (Monticello) and wineries and convenience for resident market segments have been eliminated as evaluation criteria. Moreover, a Wine Center at all the three sites would offer benefits to site neighbors, both Monticello and PVCC. That is, the two Monticello sites would benefit by helping to widen the market, as discussed in Chapter 3, while locating the Wine Center on the PVCC site would help to boost viticulture and enology programs offered by the College. The remaining seven evaluation criteria are as follows, with the first two primarily financial-related and the other five primarily market-related, particularly for tourist market segments.

The evaluation may be conducted assuming all evaluation criteria are of equal importance or weigh or to take into account that not all criteria are of equal weight. In this case we have applied judgment to give some criteria a weight of 3, others 2, and others 1.

Site Evaluation Criteria and Weighting

Criteria: Impact of Site Option on...	Weight (1,2 or 3)	Comments
Helping to Control Operating Costs	3	Opportunities for shared staffing or other services or other ways and means to reduce operating costs increases the score
Helping to Limit Capital Costs	3	A site not requiring acquisition costs and with existing infrastructure (utilities, roads, parking, etc.) scores higher than if new infrastructure or acquisition costs required. This allows available capital funds to be used for other purposes.
Adequacy of Size	2	A site large enough to accommodate a Virginia Wine Center building and contiguous demonstration vineyard and other outdoor opportunities would score higher than if outdoor opportunities are not contiguous
Access	2	A site that offers easier access from highways or well-travelled routes used by tourists and access by public transportation scores higher
Image	2	A site that is aesthetically attractive and therefore enhances the image of a Wine Center scores higher
Visibility	1	A site that offers better visibility from highways and other well-travelled places scores higher
Identity	1	A site that allows a Virginia Wine Center to have its own distinct identity scores higher

Rating the Three Sites According to the Criteria

The following table provides a qualitative assessment of the three sites for each criterion and concludes with a score from 1 to 5 with 5 as the highest and 1 as the lowest rating.

	PVCC Site	Shadwell Site	Tufton Site
Control Operating Costs	<p>There may be opportunities for the Wine Center to be on the PVCC power grid or to share costs for janitorial, landscaping, snow removal or other benefits to be negotiated if the Wine Center is on site. PVCC however cannot offer the type of management services agreement potentially offered by Monticello because it does not have a visitor attraction staff focus.</p> <p>Score: 3</p>	<p>There is an opportunity for the Wine Center, if on Monticello property, to benefit from a management services agreement that would have Monticello senior staff allocate a percentage of their time to manage the Wine Center. This would enable the Center to benefit from the expertise of Monticello marketing, education, programming and other staff and reduce costs for senior staff that would otherwise be required if not on the Monticello site. This is practical for Monticello given a desire to maintain a high standard of operation and it would be a revenue center for it. The specifics of the management services agreement need to be negotiated to ensure mutual benefits.</p> <p>Score: 5</p>	<p>There is an opportunity for the Wine Center, if on Monticello property, to benefit from a management services agreement that would have Monticello senior staff allocate a percentage of their time to manage the Wine Center. This would enable the Center to benefit from the expertise of Monticello marketing, education, programming and other staff and reduce costs for senior staff that would otherwise be required if not on the Monticello site. This is practical for Monticello given a desire to maintain a high standard of operation and it would be a revenue center for it. The specifics of the management services agreement need to be negotiated to ensure mutual benefits.</p> <p>Score: 5</p>
Limit Capital Costs	<p>The PVCC site is owned by the state and the assumption is that there will be no acquisition costs. The site has existing parking and easy access to water, sewer and other infrastructure that may be extended to a new building on the far side of the parking lot. This will help to limit capital costs and enable available capital funds to be used for other purposes.</p> <p>Score: 5</p>	<p>Both Monticello scenarios assume a long term lease at a nominal amount. This is subject to negotiation. Neither of the Monticello sites has adequate existing parking or servicing. However, the Shadwell site offers closer proximity to services than Tufton and thus lower capital cost requirements than the Tufton site but higher than for PVCC.</p> <p>Score: 2</p>	<p>Both Monticello scenarios assume a long term lease at a nominal amount. This is subject to negotiation. There are currently 14 parking spaces, an existing septic system and electrical power. This site is a substantial distance from services and extending water and sewer services to the site is estimated to cost \$2-3 million and would require entitlements.</p> <p>Score: 1</p>

	PVCC Site	Shadwell Site	Tufton Site
Adequacy of Size	The cleared area adjacent to parking is large enough to accommodate a building but a substantial number of trees would need to be removed to have a contiguous demonstration vineyard and other outdoor opportunities. The sites proposed for possible vineyards at PVCC are not contiguous. Score: 2	The site is very large and could easily accommodate a building, parking, and contiguous demonstration vineyard and other outdoor opportunities. Score: 5	The site is very large and could easily accommodate a building, parking, and contiguous demonstration vineyard and other outdoor opportunities. Score: 5
Access	This site offers the best access from I- 64 and Route 250. There is also a City bus that goes to the College thereby providing public transportation access that currently does not exist at Monticello. Score: 5	The Shadwell site is less than a mile from the I-64 off-ramp but not as close as the PVCC site. It offers very good access from Route 250. This would make it more convenient for tourists than Tufton. Score: 4	The Tufton site is farthest from the highways and thus scores the lowest. Score: 2
Image	Proximity to the existing PVCC building is a negative from an image and aesthetics perspective. The advantage of proximity to the highways is a disadvantage because of the very substantial noise from the highways. Score: 2	The site is attractive but not as much as the Tufton site. However, easy access from the highway offers a more welcoming image than Tufton Score: 4	This is the most attractive of the sites from an aesthetics perspective and would create a nice sense of arrival and thus a positive image for a Wine Center. However, the distance from the highway may create a less welcoming image for some Score: 4
Visibility	This site offers good visibility from Route 250 and potentially from I-64 thus scores the highest. However, the actual building would be blocked by trees from I-64 Score: 4	The site is elevated and offers some potential level of visibility Score: 3	The Tufton site would not offer good visibility Score: 1

	PVCC Site	Shadwell Site	Tufton Site
Independent Identity	Access would be the same as to the PVCC campus and thus very closely associated with it. This would be reinforced by sharing the parking and being next to the PVCC administrative building. While there would be advantages to a close association with PVCC it may be a negative for some tourists. This site would make it more difficult for the Wine Center to have an independent identity. Score : 2	Although on Monticello Foundation lands, this site allows for an independent entrance and an identity for a Virginia Wine Center that is separate from Monticello. Score: 3	With access to this site only practical through the Thomas Jefferson Highway and its physical proximity to Monticello this would make it difficult to establish a distinct identity independent of Monticello as a Virginia Wine Center. Score: 1

Summary of Numerical Ratings and Ranking the Sites

The following table summarizes the numerical ratings according to the judgment of the consultants with respect to the evaluation criteria, weighting scale and the rating of each of the sites. Two scores are indicated, one without weighting and the other with the weighting scale taken into account. In both cases *the evaluation ranks the Shadwell site the highest, followed by the PVCC site and lastly the Tufton site. However, at this point we do not recommend assuming the Shadwell site for the Virginia Wine Center because part of the reason it ranks the highest is an assumption that a mutually beneficial management services agreement will be negotiated with the Monticello Foundation.* That negotiation has not taken place and could take place as part of the second phase of this planning process.

SUMMARY OF SITE EVALUATION SCORES AND RANKINGS FOR VIRGINIA WINE CENTER	Weighting (1-3)	PVCC Site		Shadwell Site		Tufton Site	
		Rating (1-5)	Rating with Weighting Factor	Rating (1-5)	Rating with Weighting Factor	Rating (1-5)	Rating with Weighting Factor
Criteria - Implications For:							
Controlling Operating Costs	3	3	9	5	15	5	15
Limiting Capital Costs	3	5	15	2	6	1	3
Adequacy of Size	2	2	4	5	10	5	10
Access	2	5	10	4	8	2	4
Image/Aesthetics	2	2	4	4	8	4	8
Visibility	1	5	5	3	3	1	1
Independent Identity	1	2	2	3	3	1	1
Total Score Without Weighting		24		26		19	
TOTAL SCORE WITH WEIGHTING			49		53		42
Ranking			2		1		3

6.2 PRELIMINARY SPACE PROGRAMMING

Overview of Three options

The following overview compares three potential approaches to the building:

- A. “Basic” size, which meets all the needs that have been described in the concept, but limits spaces to control costs and combines the auditorium and multi-purpose programming room into a single (flat-floor) space;
- B. “Expanded” size, which allows for more generous winemaking facilities and gallery, as well as a dedicated 200 seat auditorium in addition to a multipurpose room; and
- C. “Expanded + Market” which includes space for a modestly sized specialty food operation modeled on Napa’s Oxbow Market or New York’s Eataly

It is important to note that the approach can be phased, with a theater or market added at a later date.

Space and land needs for each option are summarized below, followed by a detailed space lists.

	A. Basic		B. Expanded		C. Expanded + Market	
Building Program: Space Categories	Net Sq Ft	%	Net Sq Ft	%	Net Sq Ft	%
Public Experience	13,000	44%	14,700	42%	14,700	31%
Winemaking (accessible to the public)	4,000	13%	6,000	17%	6,000	13%
Education & Events	4,600	15%	5,600	16%	5,600	12%
Back of House	8,250	28%	8,500	24%	8,500	18%
Marketplace	n/a		n/a		13,000	27%
Net Square Feet Total	29,850		34,800		47,800	
Gross Sq Ft Total (1.3 grossing factor)	38,805		45,240		62,140	
Outdoor - Acres	3.79		7.12		7.12	
Site Required For Building & Outdoor	4.68		8.16		8.54	

Option A: Basic

Outdoor		
Space	Net Square Feet	Notes
Demonstration Vineyard	100,000	Approximately 2 acres; used by academic partner(s) for research and public programs
Event/Festival Lawn	15,000	Adjacent to Vineyard and Crush Pad/Event Patio
Crush Pad/Event Patio	5,000	Covered; can be used for farmers markets; small musical events, dinners, etc.
Parking	45,000	Parking for 150 cars
Outdoor Subtotal SF/Acres:	165,000	3.79

Public Experience		
Space	Net Square Feet	Notes
Reception: Information, Tour Sales, Car Services	1,500	Info desk sells tickets for operators, have maps and other promotion materials
Exhibition Area	3,000	Includes room for orientation film screening area; Could be used as a reception space
Tasting Room/Event Space	2,000	Two bars and 4-6 stations
Gift Shop	2,000	
Café	2,000	
Demonstration Kitchen	1,000	Includes chef's table
Restrooms	1,500	Distributed through public area; large grouping near entry; 4-6 accessible event patio
Public Experience Subtotal:	13,000	

Winemaking (all visible/accessible to the public)		
Space	Net Square Feet	Notes
Tank Room	1,500	Large enough for teaching/equip changes
Barrel Room	1,500	Can be used as intimate meeting space as well
Enology Lab	1,000	
Winemaking Subtotal:	4,000	

Education & Events		
Space	Net Square Feet	Notes
Classrooms (2)	1,600	2 @ 800 each; accommodates 25 adult learners; can be combined into larger meeting space
Blackbox (flat floor)	3,000	Room for 200; retractable seating could double as venue for meeting, programs and dinners
Multipurpose Space	n/a	
Education & Events Subtotal:	4,600	

Back of House		
Space	Net Square Feet	Notes
Administrative Offices	1,200	10-15 staff members
Staff Areas	800	For hourly staff; lockers, break room, restroom
Auditorium/Blackbox Support	750	Green room, storage
Event Support	1,500	Chair/table storage; prep area
Tasting Room Storage	500	
Gift Shop Storage	1,000	
Catering Area/Kitchen	1,000	
Café Kitchen	750	
Loading Area w/Dock	750	
Back of House Subtotal:	8,250	

Net Square Feet Total	29,850
Grossing Factor*	1.30
Gross Square Feet Total	38,805
Site Required For Building & Outdoor Program in Acres	4.68

*Grossing includes mechanical spaces, wall thickness and circulation

Options B: Expanded & Option C: Expanded + Market

B. Expanded Space Program

Outdoor			
Space	Net Square Feet	Notes	
Demonstration Vineyard	220,000	Approximately 5 acres; used by academic partner(s) for research and public programs	
Event/Festival Lawn	20,000	Adjacent to Vineyard and Crush Pad/Event Patio	
Crush Pad/Event Patio	10,000	Covered; can be used for farmers markets; small musical events, dinners, etc.	
Parking	60,000	Parking for 200 cars	
Outdoor Subtotal SF/Acres:	310,000	7.12	

Public Experience			
Space	Net Square Feet	Notes	
Reception: Information, Tour Sales, Car Services	1,500	Info desk sells tickets for operators, have maps and other promotion materials	
Exhibition Area	3,500	Includes room for orientation film screening area; Could be used as a reception space	
Tasting Room/Event Space	2,000	Two bars and 4-6 stations	
Gift Shop	3,000		
Café	2,000		
Demonstration Kitchen	1,200	Includes chef's table	
Restrooms	1,500	Distributed through public area; large grouping near entry; 4-6 accessible event patio	
Public Experience Subtotal:	14,700		

Winemaking (all visible/accessible to the public)			
Space	Net Square Feet	Notes	
Tank Room	2,000	Room for teaching/equip changes	
Barrel Room	2,500	Can be used as intimate meeting space as well	
Enology Lab(s)	1,500	Could be two smaller labs	
Winemaking Subtotal:	6,000		

Education & Events			
Space	Net Square Feet	Notes	
Classrooms (2)	1,600	2 @ 800 each; accommodates 25 adult learners; can be combined into larger meeting space	
Auditorium/Blackbox	3,000	Room for 200; could be fixed or retractable seating. If retractable seating could double as venue for meeting, programs and dinners	
Multipurpose Space	1,000	For smaller educational programs; also used as prep for major events	
Education & Events Subtotal:	5,600		

Back of House		
Space	Net Square Feet	Notes
Administrative Offices	1,200	
Staff Areas	800	Lockers, break room, restroom
Auditorium/Blackbox Support	1,000	Green room, storage
Event Support	1,500	Chair/table storage; prep area
Tasting Room Storage	500	
Gift Shop Storage	1,000	
Catering Area/Kitchen	1,000	
Café Kitchen	750	
Loading Area w/Dock	750	
Back of House Subtotal:	8,500	

Net Square Feet Total	34,800
Grossing Factor*	1.30
Gross Square Feet Total	45,240
Site Required For Building & Outdoor Program in Acres	8.16

*Grossing includes mechanical spaces, wall thickness and circulation

C. Expanded Space Program + Market

Optional: Marketplace	Gross Square Feet	Notes
Indoor Market/Food Stalls	13,000	Small version of SF Ferry Building/Oxbow Market/Eataly; 10,000 + 1.3 grossing factor

Net Square Feet Total	47,800
Grossing Factor*	1.30
Gross Square Feet Total	62,140
Site Required For Building & Outdoor Program in Acres	8.54

*Grossing includes mechanical spaces, wall thickness and circulation

7. OPPORTUNITY ASSESSMENT

The following sections identify target markets and likely ranges for capital costs, annual operating costs, and annual attendance.

7.1 TARGET MARKETS

- **Wine, beer and food industry professionals** who will use the Center for a variety of purposes, including professional development, networking and personal enjoyment.
- **Wine tourists**, profiled in Chapter 3, and more likely to be travelling as couples or friends groups without children, in the 34-55 age category, with higher levels of educational attainment and income.
- **Monticello visitors.** All three sites are relatively close to Monticello and there should be crossover visits given similar market profiles. If on Monticello lands and with a potential management services agreement then there are greater incentives for Monticello to encourage its visitors to also attend the Wine Center.
- **Visiting friends and relatives** who are likely to be accompanied by local residents to wine tastings and winery tours and likely to combine visits to Monticello. This includes a large number of parents of UVA and other college students.
- **Private or corporate events** in wine tours would be part of the itinerary and the Wine Center could offer educational and interactive opportunities to enhance the experience offered.

7.2 POTENTIAL ATTENDANCE RANGE

Cultural Benchmarks in Charlottesville

The table on page 20, Major Cultural Attractions in Charlottesville Area, highlights a few important points:

- Average annual attendance to museums and historic attractions is 108,000. This number is skewed significantly upward by Monticello's annual visitation of 450,000. The next largest attraction is UVA's Rotunda with 135,000 annual visitors.
- Average attendance at festivals is 16,000.
- Attendance at Shenandoah National Park is 1.1 million.

Additionally, Carter Mountain Orchards attracts an estimated 50,000 to 100,000 people over the 8-month operating season annually.

Wine Centers around the World

The table below shows that existing wine centers report average annual attendance of 150,000.

Institution	Location	Attendance
Vinopolis	London, United Kingdom	500,000
CLOSED: Copia	Napa, California, USA	230,000
Napa Valley Welcome Center	Napa, California, USA	150,000
Dinastia Vivanco - La Rioja	Briones, Rioja, Spain	150,000
Le Hameau Du Vin	Romaneche-Thorins,	100,000
Loisium	Langenlois, Austria	100,000
New York Wine and Culinary Center	Canandaigua, New York, USA	67,000
Lodi-Woodbridge Wine and Visitor Center	Lodi, California, USA	30,000
The Wine Visitor and Education Center	Niagara, Ontario, Canada	27,500
Average All		150,500
Median All		100,000

The Virginia Wine Industry

- There are 4,800 Full Time Equivalent (FTE) wine industry employees in Virginia, with likely over half in the Monticello region. With so many seasonal and part time workers in the industry, it is not a stretch to assume these Full Time Equivalents total of over 7,500 individuals working with Virginia wine. When beer brewers, artisanal food producers and others are also considered, the size of the Wine Center’s “community of interest” likely tops 10,000.
- There were 1.6M visits to Virginia wineries reported in 2010. One successful winery reported 80,000 visitors per year.

Potential Attendance Range for Virginia Wine Center

It is estimated that the Virginia Wine Center would attract between 75,000 and 150,000 general public visitors per year. This would be bolstered by another 5,000-15,000 repeat “visits” from industry professionals and students associated with the programs of the Wine Center for a **total attendance of 80,000 to 165,000, with a sweet spot around 125,000.**

It is important to note at this early stage that the range identified is largely dependent on the final assumptions: site, shared services/management agreement(s), level of public programming, marketing strategy, building design and so on. Several factors can drive this estimate to the high end (or even higher), including but not limited to:

- A highly visible, convenient and picturesque site;
- An incentive based agreement with Monticello that promotes cross-visitation;

- A robust approach to festivals and other interactive programs like an annual crush;
- Marketing partnerships with the CVB, Wine Marketing Board and others;
- Ample staff to effectively program, manage partnerships, and deliver visitor service of the highest quality;
- Sufficient programming budget to ensure the Center always feels “alive” with constant programming and activities; and
- A thoughtful integration among the academic partner(s), wine and food professionals, and public programming that exposes the public to expert tours, master classes and other special attractions.

Conversely, if negative factors come into play, such as uninspiring building/landscape design, poor visitor service, or a static atmosphere that relies on simply giving out information and providing an exhibit and film, the Center would see attendance on the low end of the scale – or even lower. (Note: New York Wine and Culinary Center reports 67,000 visitors.)

7.3 CAPITAL COST RANGE

As explained in Chapter 6, three potential space plans have been proposed. A phased approach may be taken, with the “Basic” built first and a multipurpose space and/or market added in a future phase of development. It is assumed that land will be donated at no cost.

The costs below represent a range of quality, with “medium” approximating the level of quality of the new Visitors Center and retail complex at Monticello. It is recommended that this is the level of quality that the Wine Center should emulate.

	A. Basic		B. Expanded		C. Expanded + Market	
Building: Gross Square Feet	38,805		45,240		62,140	
Demo Vineyard: Acres	2.3		5.1		5.1	
Lawn/Patio/Parking: Square Feet	65,000.0		90,000.0		90,000.0	
Building Construction per sq. ft.						
Low	\$ 300	\$ 11,641,500	\$ 13,572,000	\$ 18,642,000		
Medium	\$ 450	\$ 17,462,250	\$ 20,358,000	\$ 27,963,000		
High	\$ 600	\$ 23,283,000	\$ 27,144,000	\$ 37,284,000		
Outdoor Spaces per acre						
Vineyard	\$ 20,000	\$ 45,914	\$ 101,010	\$ 101,010		
Lawn/Patio/Parking	\$ 30	\$ 1,950,000	\$ 2,700,000	\$ 2,700,000		
Soft Costs						
Low	30%	\$ 4,091,224	\$ 4,911,903	\$ 6,432,903		
Medium	30%	\$ 5,837,449	\$ 6,947,703	\$ 9,229,203		
High	30%	\$ 7,583,674	\$ 8,983,503	\$ 12,025,503		
Total						
Low		\$ 17,728,638	\$ 21,284,913	\$ 27,875,913		
Medium		\$ 25,295,613	\$ 30,106,713	\$ 39,993,213		
High		\$ 32,862,588	\$ 38,928,513	\$ 52,110,513		

7.4 ANNUAL OPERATING BUDGET

Budgets for Existing Wine Centers

Depending on the model, the operating budget of existing wine centers vary greatly. The multidimensional Vinopolis has an operating budget of 12.8M (and reports a modest profit based on a robust events business). The Lodi Visitor Center – a gateway model with a very small building and limited offsite programming – operates on \$680K per year. The New York Wine and Culinary Center is the least efficient, with a high annual operating budget but low visitation, resulting in a cost per visitor of \$52.

Institution	Operating Budget (USD)	Visitors	Cost per Visitor
Vinopolis	\$12,800,000	500,000	\$ 26
New York Wine and Culinary Center	\$3,500,000	67,000	\$ 52
Loisium	\$1,730,000	100,000	\$ 17
Robert Mondavi Institute for Wine and Food Science	\$900,000	n/a	n/a
Lodi-Woodbridge Wine and Visitor Center	\$680,000	30,000	\$ 23
Average All	\$ 3,922,000		\$ 29
Median All	\$ 1,730,000		\$ 24

Potential Annual Budget Range for Virginia Wine Center

At this preliminary stage the best means for determining the potential annual operating costs of the Virginia Wine Center is to consider the model: a hybrid of an Education Center, Gateway to the Region, and Wine & Food Center.

A comfortable annual operating budget for the Virginia Wine Center would be between \$1M and \$2M depending heavily on the partnership agreements that may be arranged for, for example, management services, formal education and public programming.

This range would assume a staff of 10-20 FTEs (full time equivalents), which is in the range of what would be needed to operate such an institution.

Sources of Revenue

Earned

Although admission charges are not assumed, it is likely that the Wine Center could earn a significant portion of its operating budget. At this point it is assumed that earned income could account for approximately 50% of the Wine Center’s budget. Earned revenue could be derived from:

- Registrations and ticket sales from public programs, special events, and workshops;
- Tuition share or space rental (TBD) with academic partner for formal education programs;
- Retail sales, reflecting wine and specialty foods from throughout Virginia as well as souvenirs and books associated with wine heritage and production;
- Rental opportunities, especially as a “neutral ground” for major wine industry events, and during evening hours, holiday season and for corporate meetings;
- Corporate memberships by wineries who are interested in enjoying the benefits of Wine Center programming and continuing education;
- Fees from tour operators and cars services who locate or advertise on site;
- Income from tasting room and food service.

Contributed

Preliminary discussions with leadership of the Virginia Wine Board indicated several potential areas for support of or partnership on Wine Center programming and services:

- Direct support for professional development and training programs;
- Direct support for public programs to cultivate appreciation and drive attendance at wineries;
- Direct and/or indirect marketing support;
- Rental of venue for special events such as the Governor’s Cup, lectures and symposia;
- Advisory services to guide program development.

In addition to support from the industry, the Wine Center should have a development person on staff to cultivate support and solicit sponsorships and donations regionally from corporations and individuals with an interest in the Wine Center’s mission and programming.

Grants should also be written to fund research, tourism initiatives and other programs as appropriate. Potential sources include private foundations, and state and federal agencies such as USDA.

Government

It is assumed that the Commonwealth of Virginia and/or the County of Albemarle will be required to provide some level of support for the annual operating costs of the Wine Center. Preliminary conversations with government representatives indicated potential opportunities from the following sources:

- Growth in TOT (hotel) tax revenue
- Marketing support through the CVB
- Wine sales tax revenues

Investment

Ideally, the Wine Center could develop an endowment to fund a portion of its annual operating budget. For perspective, a \$5M endowment would provide \$200K per year (assuming a conservative 4% spending rate).

8. CONCLUSION

8.1 REVIEW OF KEY POINTS

All preliminary research indicates broad support, from both the public and wine professionals, for a Virginia Wine Center. The following figures represent early, but conservative size, attendance and cost estimates:

Facility Size (sq. ft):	Basic: 39K / Expanded: 45K / Expanded + Market: 62K
Capital Cost (medium cost):	Basic: \$25M / Expanded: \$30M / Expanded + Market: \$40M
Annual Attendance Range:	80,000 – 165,000 (125,000+ if well executed)
Annual Operating Cost:	\$1M – \$2M, heavily dependent on partnership agreements.

8.2 NEXT STEPS

The goal of Phase 2 is to provide a sustainable plan for the Center that aligns and “right-sizes” the following elements:

- Programs and experiences that are attractive to current and future residents, tourists and wine industry professionals;
- A plan for a facility that is optimally sited, sized and costed so that the most appropriate architect can be selected and immediately proceed to design development; and
- A credible business and operating plan that will build confidence among supporters that the Center has been comprehensively planned.

Phase 2 would include the following elements:

1. Visitor Experience, Branding and Integrated Marketing Plan
2. Facilities Plan
3. Operating and Business Plan



APPENDIX A: ACKNOWLEDGEMENTS

FORTHCOMING: LEE TO PROVIDE NAMES AND TITLES OF ALL INVOLVED (Visioning Workshop, interviews etc.)

APPENDIX B: VIRGINIA WINERIES

The following is a full list of Virginia wineries taken from the Virginia Wine Marketing Office's website www.virginiawine.org

#	Name	Street	City
1	2 Witches Winery and Brewing Co., Inc.	209 Trade Street	Danville, 24541
2	612 Vineyard	864 Shepherds Mill Road	Berryville, 22611-3041
3	8 Chains North Winery	38593 Daymont Lane	Waterford, 20197-1038
4	868 Estate Vineyards	14001 Harpers Ferry Rd.	Purcellville, 20132
5	Abingdon Vineyard Winery	20530 Alvarado Rd	Abingdon, Virginia 24211
6	Above Ground Winery	P.O. Box 2203	Purcellville, 20132
7	Afton Mountain Vineyards	234 Vineyard Lane	Afton, Virginia 22920
8	Albemarle CiderWorks	2545 Rural Ridge Lane	North Garden, Virginia 22959
9	Altillo Vineyards	620 Level Run Rd.	Hurt, 24536
10	AmRhein's Wine Cellars	9243 Patterson Drive	Bent Mountain, Virginia 240
11	Ankida Ridge Vineyards	Franklin Creek Rd.	Amherst, 24521
12	Annefield Vineyards	3200 Sunny Side Road	Saxe, VA 23967
13	Aspen Dale Winery at The Barn	3180 Aspen Dale Lane (GPS: 11083 John Marshall	Delaplane, Virginia 20144
14	Athena Vineyards & Winery	3138 Jessie Dupont Memorial Hwy	Heathsville, Virginia 22473
15	Attimo Winery	4025 and 4071 Childress Road	Christiansburg, 24073
16	Autumn Hill Vineyards Blueridge Winery	301 River Dr.	Stanardsville, VA 22973
17	Barboursville Vineyards	17655 Winery Rd	Barboursville, Virginia 22923
18	Barrel Oak Winery	3623 Grove Ln	Delaplane, VIRGINIA 20144
19	Barren Ridge Vineyards	984 Barren Ridge Road	Fishersville, VA 22939
20	Beliveau Estate Winery	5415 Gallion Ridge Road	Blacksburg, 24060
21	Belle Mount Vineyards	2570 Newland Rd	Warsaw, Virginia 22572
22	Berry Hill Vineyard	466 Dearing Road	Flint Hill , 22627 (Garman GPS use Huntly 22640)
23	Blacksnake Meadery	605 Buffalo Road	Dugspur, Virginia 24325
24	Blenheim Vineyards	31 Blenheim Farm	Charlottesville, Virginia 22902
25	Bloxom Vineyard	26130 mason road	bloxom, Virginia 23308
26	Blue Bee Cider	212 W. 6th Street	Richmond, 23224
27	Blue Ridge Vineyard	1027 Shiloh Dr.	Eagle Rock, VA 24085
28	Bluemont Vineyard	18755 Foggy Bottom Road	Bluemont, Virginia 20135
29	Bluestone Vineyard	4828 Spring Creek Road	Bridgewater, 22812
30	Bodie Vineyards	1809 May Way Drive	Powhatan, 23139
31	Bogati Bodega	35246 Harry Byrd Highway	Round Hill, 20142
32	Bold Rock Cider	1020 Rockfish Valley Hwy Wintergreen	Nellysford, 22958
33	Boxwood Estate Winery	2042 Burrland Rd	Middleburg, VA 20117
34	Breaux Vineyards	36888 Breaux Vineyards Lane	Purcellville, Virginia 20132
35	Bright Meadows Farm	1181 Nathalie Road	Nathalie, VA 24577
36	Brightwood Vineyard & Farm	1202 Lillards Ford Rd	Brightwood, 22715
37	Brooks Mill Winery	6221 Brooks Mill Rd.	Wirtz, VA 24184
38	Burnley Vineyards	4500 Winery Lane	Barboursville, Virginia 22923
39	Byrd Cellars	5847 River Road West	Goochland, 23063
40	Cana Vineyards and Winery of Middleburg	38600 John Mosby Highway	Middleburg, 20117

#	Name	Street	City
41	Capitol Vineyards	3600 Sage Rd.	Delaplane, 20144
42	Cardamon Family Vineyards	12226 Harpers Ferry Rd	Purcellville, 20132
43	Cardinal Point Vineyard & Winery	9423 Batesville Road	Afton, Virginia 22920
44	Carroll Vineyards	29 SOUTH KING STREET	LEESBURG, 20175
45	Casanel Vineyards	17956 Canby Road 17952 Canby Road	Leesburg, Virginia 20175
46	Castle Gruen Vineyards and Winery	1272 Meander Run Road	Locust Dale, Virginia 22948
47	Castle Hill Cider	6065 Turkey Sag Rd	Keswick, 22947
48	Catoctin Creek Winery	14426 Richards Run Lane	Purcellville, 20132
49	Cave Ridge Vineyard	1476 Conicville Rd	Mt. Jackson, VA 22842
50	Cedar Creek Winery	7384 Zepp Road	Star Tannery, 22654
51	Chateau MerrillAnne	16234 Marquis Rd.	Orange, 22960
52	Chateau Morrisette	287 Winery Road SW (MP 171.5 Blue Ridge Pkwy)	Floyd, VA 24091
53	Chateau OBrien at Northpoint	3238 Railstop Road	Markham, Virginia 22643
54	Chateau Z Vineyard	1219 Main Street	Lynchburg, 24504
55	Chatham Vineyards on Church Creek	9232 Chatham Road	Machipongo, VA 23405
56	Chester Gap Cellars	4615 Remount Rd, PO Box 108	Front Royal, Virginia 22630
57	Chestnut Oak Vineyard	5050 Stoney Point Road	Barboursville, 22923
58	Chrysalis Vineyards	23876 Champe Ford Rd.	Middleburg, Virginia 20117
59	Cobbler Mountain Cellars	5909 Long Fall Lane (see notes)	Delaplane, 20144
60	Coltsfoot Winery	19158 Stone Mountain Road	Abingdon, 24210
61	Cooper Vineyards	13372 Shannon Hill Rd	Louisa, Virginia 23093
62	Corcoran Vineyards	14635 Corkys Farm Lane	Waterford, VA 20197
63	Creeks Edge Winery	13068 Taylorstown Road (Future 41255 Annas Lane) (The Village of Taylorstown)	Lovettsville, VA, 20180
64	CrossKeys Vineyards	6011 East Timber Ridge Road	Mt. Crawford, VA 22841
65	Crushed Cellars	37938 Charles Town Pike	Purcellville, 20132
66	Davis Valley Winery	1167 Davis Valley Road	Rural Retreat, VA 24368
67	Delaplane Cellars	2187 Winchester Road	Delaplane, Virginia 20144-
68	DeFosse Vineyards and Winery	500 DeFosse Winery Lane	Faber, VA 22938
69	Democracy Vineyards	585 Mountain Cove Road P.O. Box 451	Livingston, 22949
70	Desert Rose Ranch & Winery	13726 Hume Rd.	Hume, 22639
71	DeVault Family Vineyards	247 Station Lane	Concord, 24538
72	Doukénie Winery	14727 Mountain Road	Purcellville, Virginia 20132
73	Dry Mill Vineyards Winery	18195 Dry Mill Road	Leesburg, Virginia 20175
74	DuCard Vineyards	40 Gibson Hollow Lane	Etlan (Madison County),
75	Early Mountain Vineyards	6109 Wolfstown-Hood Road	Madison, Virginia 22727
76	Elk Island Winery	5759 River Road West (Winery Entrance Sign)	Goochland, 23063
77	Fabbioli Cellars	15669 Limestone School Road	Leesburg, Virginia 20176
78	Fincastle Vineyard & Winery	203 Maple Ridge Lane	Fincastle, Virginia 24090
79	Firefly Hill Vineyards	4289 Northfork Rd	Elliston, VA 24087
80	First Colony Winery	1650 Harris Creek Road	Charlottesville, Virginia 22902
81	Flying Fox Vineyard	27 Chapel Hollow Road	Afton, Virginia 22920
82	Foggy Ridge Cider	1328 Pineview Road	Dugspur, Virginia 24325
83	Fox Meadow Winery	3310 Freezeland Road	Linden, Virginia 22642
84	Gabriele Rausse Winery	P. O. Box 3956	Charlottesville, VA 22903
85	Gadino Cellars	92 Schoolhouse Road	Washington, Virginia 22747
86	Gauthier Vineyard	5000 Farmer's Drive	Barhamsville, 23011
87	General's Ridge Vineyard	1618 Weldons Drive	Hague, Virginia 22469
88	Glass House Winery	5898 Free Union Rd	Free Union, Virginia 22940
89	Glen Manor Vineyards	2244 Browntown Road	Front Royal, Virginia 22630
90	Good Luck Cellars	1025 Good Luck Road	Kilmarnock, 22482
91	Grace Estate Winery	5273 Mount Juliet Farm	Crozet, 22932
92	Granite Heights Winery	8141 Opal Rd.	Warrenton, 20186
93	Gray Ghost Vineyards	14706 Lee Highway	Amisville, Virginia 20106
94	Grayhaven Winery	4675 East Grey Fox Circle	Gum Spring, VA 23065
95	Greenhill Winery & Vineyards	23595 Winery Lane	Middleburg, 20117
96	Greenwood Vineyards	9050 Mountain Road	Vernon Hill, 24597
97	Guilford Ridge Vineyards	328 Running Pine Road	Luray, 22835
98	Hamlet Vineyards	405 Riverside Drive	Bassett, 24055
99	Hartwood Winery	345 Hartwood Road	Fredericksburg, Virginia 22406

#	Name	Street	City
100	Hickory Hill Vineyards Winery	1722 Hickory Cove Lane	Moneta, VA 24121
101	Hidden Brook Winery	43301 Sprinks Ferry Rd.	Leesburg, VA 20176
102	Hiddencroft Vineyards	12202 Axline Road	Lovettsville, Virginia 20180
103	Hill Top Berry Farm and Winery	2800 Berry Hill Road	Nellysford, Virginia 22958
104	Hillsborough Vineyards	36716 Charles Town Pike	Purcellville, VA 20132
105	Holly Grove Vineyards	6404 Holly Bluff Drive	Franktown, Virginia 23354
106	Honah Lee Vineyard	13172 Honah Lee Farm Drive	Gordonsville, 22942
107	Horton Vineyards	6399 Spotswood Trail	Gordonsville, VA 22942
108	Hume Vineyards	5396 Washwright Rd.	Hume, VA 22639
109	Hummel Vineyards	1005 Panorama Road	Montross, VA 22520
110	Hunt's Vineyard	57 Hawkins Pond Lane	Stuarts Draft, 24477
111	Hunters Run Wine Barn	40325 Charlestown Pike	Hamilton, 20158
112	Hunting Creek Vineyards	2000 Addie Williams Trail	Clover, Virginia 24534
113	Ingleside Vineyards	5872 Leedstown Road	Oak Grove, Virginia 22443
114	Jacey Vineyards	619 Train Lane P.O Box 338	Wicomico Church, 22579
115	James River Cellars	11008 Washington Hwy.	Glen Allen, Virginia 23059
116	Jefferson Vineyards	1353 Thomas Jefferson Parkway	Charlottesville, VA 22902
117	Jump Mountain Vineyard	1493 Walkers Creek Rd	Rockbridge Baths, 24473
118	Keswick Vineyards	1575 Keswick Winery Drive	Keswick, VA 22947
119	Kilaurwen Winery, LLC	1543 Evergreen Church Road	Stanardsville, 22973
120	King Family Vineyards	6550 Roseland Farm	Crozet, Virginia 22932
121	Knights Gambit Vineyard	2218 Lake Albemarle Rd	Charlottesville, 22901
122	Lake Anna Winery	5621 Courthouse Rd	Spotsylvania, VA 22551
123	Lazy Days Winery	1351 N Amherst Hwy	Amherst, 24521
124	Leaves of Grass Vineyards	39060 John Mosby Hwy	Middleburg, 20117
125	Leo Grande Vineyards & Winery	1343 Wingfield Drive	Goode, Virginia 24556
126	Lexington Valley Vineyard	80 Norton Way	Rockbridge Baths, Virginia 24473
127	Little Washington Winery	72 Christmas Tree Lane	Washington, 22747
128	Lost Creek Vineyard and Winery	43277 Spinks Ferry Rd	Leesburg, Virginia 20176
129	Loudoun Valley Vineyards	38516 Charlestown Pike	Waterford, VA 20197
130	Lovingston Winery	885 Freshwater Cove Lane	Lovingston, VA 22949
131	Luray Caverns Vineyard		
132	Maggie Malick Wine Caves	12138 Harpers Ferry Rd	Purcellville, 20132
133	Marterella Winery	8278 Falcon Glen Road	Warrenton, VA 20186
134	Mattaponi Winery	7530 Morris Road	Spotsylvania, Virginia 22551
135	Mediterranean Cellars	8295 Falcon Glen Road	Warrenton, VA 20186
136	Meriwether Springs Vineyard	1040 Owensville Road	Ivy, 22945
137	Miracle Valley Vineyard	3661 Double J Lane	Delaplane, VA 20144
138	Misty Mountain Meadworks	1531 Pack Horse Rd	Winchester, VA 22603
139	Molliver Vineyards & Winery	2046 Waller Rd.	Nathalie, Virginia 24577
140	Molon Lave Vineyards	10075 Lees Mill Road	Warrenton, 20186
141	Montdomaine	5134 Viewmont West Dr.	Charlottesville, 22902
142	Morais Vineyards & Winery	11409 Marsh Road	Bealeton, 22712
143	Moss Vineyards	1849 Simmons Gap Road	Nortonville, 22935
144	Mountain Cove Vineyards	1362 Fortunes Cove Lane	Lovingston, VA 22949
145	Mountain View Vineyard	444 Signal Knob Drive	Strasburg, 22657
146	MountainRose Vineyards Inc	10439 N. Reservoir Rd.	Wise, VA 24293
147	Mountfair Vineyards	4875 Fox Mountain Rd	Crozet, Virginia 22932
148	Mt Vale Vineyards	3222 Meadow Creek Road	Galax, 24333
149	Naked Mountain Winery and Vineyards	2747 Leeds Manor Road PO Box 115	Markham, Virginia 22643
150	Narmada Winery	43 Narmada Lane	Amissville, Virginia 20106
151	New Kent Winery	8400 Old Church Road	New Kent, VA 23124
152	North Gate Vineyard	16031 Hillsboro Road	Purcellville, VA 20132
153	North Mountain Vineyard & Winery	4374 Swartz Road	Maurertown, Virginia 22644
154	Notaviva Vineyards	13274 Sagle Road	Purcellville, VA 20132
155	Nova Ridge Vineyards		Waterford, 20197
156	Oak Crest Vineyard & Winery	8215 Oak Crest Drive	King George, Virginia 22485
157	Old Hill Cider	17768 Honeyville Road	Timberville, 22853
158	Old House Vineyards	18351 Corkys Lane	Culpeper, VA 22701
159	Otium Cellars	18050 Tranquility Rd.	Purcellville, 20132






#	Name	Street	City
160	Ox Eye Vineyards	44 Middlebrook Avenue	Staunton, 24401
161	Paradise Springs Winery	13219 Yates Ford Road	Clifton, Virginia 20124
162	Peaks of Otter Winery	2122 Sheep Creek Rd	Bedford, Virginia 24523
163	Pearmund Cellars	6190 Georgetown Rd.	Broad Run, VA 20137
164	Philip Carter Winery of Virginia	4366 Stillhouse Road	Hume, VA 22639
165	Pippin Hill Farm & Vineyards	5022 Plank Road	North Garden, 22959
166	Pollak Vineyards	330 Newtown Road	Greenwood, VA 22943
167	Potomac Point Winery	275 Decatur Road	Stafford, Virginia 22554
168	Potter's Craft Cider		
169	Preston Ridge Winery	4105 Preston Rd	Martinsville, 24112
170	Prince Michel Vineyard	154 Winery Lane	Leon, Virginia 22725
171	Pungo Ridge Winery	1665 Princess Anne rd.	Virginia Beach, 23456
172	Quattro Goombas Winery	22860 James Monroe Hwy.	Aldie, Virginia 20105
173	Quievremont	67 Reality Farm Ln	Washington, 22747
174	Quievremont Wine	115 Reality Farm Lane	Washington, 22747
175	Ramulose Ridge Vineyards	3061 Hendricks Store road	Moneta, 24121
176	Rappahannock Cellars	14437 Hume Road	Huntly, VA 22640
177	RdV Vineyards	2550 Delaplane Grade Rd	Delaplane, 20144
178	Rebec Vineyards Inc	2229 North Amherst Hwy	Amherst, VA 24521
179	Reynard Florence Vineyard	16109 Burnley Road	Barboursville, 22923
180	Rockbridge Vineyard	35 Hill View Lane	Raphine, VA 24472
181	Rogers Ford Farm Winery	14672 Rogers Ford Road	Sumerduck, VA 22742
182	Rosemont Vineyards & Winery	1050 Blackridge Road	LaCrosse, Virginia 23950
183	Rural Retreat Winery & Vineyards	202 Church Street	Rural Retreat, Virginia 24368
184	Sans Soucy Vineyards	1571 Mt Calvary Rd	Brookneal, Virginia 24528
185	Saudé Creek Vineyards	16230 Cooks Mill Rd	Lanexa, 23089
186	SavoyLee Winery	5800 Johnson Mountain Road	Huddleston, VA 24104
187	Sharp Rock Vineyards	5 Sharp Rock Rd	Sperryville, Virginia 22740
188	Shenandoah Vineyards	3659 S. Ox Rd.	Edinburg, VA 22824
189	Skippers Creek Vineyard	965 Rocky Ford Rd	Powhatan, 23139
190	Spring Creek Wine Cellar	3628 Baker Mountain Road	Pamplin City, Virginia 23958
191	Stanburn Winery	158 Conner Dr.	Stuart, 24171
192	Stinson Vineyards	4744 Sugar Hollow Road	Crozet, 22932
193	Stone Mountain Vineyards	1376 Wyatt Mountain Road	Dyke, VA 22935
194	Stone Tower Winery	19925 Hogback Mountain Rd	Leesburg, 20175
195	Stonehouse Meadery	36580 Shoemaker School Road	PURCELLVILLE, 20132
196	Sunset Hills Vineyard LLC	38295 Fremont Overlook Lane	Purcellville, Virginia 20132
197	Tarara Winery	13648 Tarara Lane	Leesburg, Virginia 20176
198	The Barns at Hamilton Station Vineyards	16804 Hamilton Station Road	Hamilton, VA, 20158
199	The Dog and Oyster Vineyard	170 White Fences Drive (Vineyard) 65 Tavern Road (Inn)	Irvington, 22480
200	The Hague Winery	8268 Cople Highway P.O. Box 141	Hague, Virginia 22469
201	The Homeplace Vineyard	568 Rigney Circle	Chatham, 24531
202	The Winery at Bull Run	15950 Lee Highway	Centreville, 20120
203	The Winery at Kindred Pointe	3575 Conicville Road	Mount Jackson, 22842
204	The Winery at La Grange	4970 Antioch Road	Haymarket, Virginia 20169
205	Thistle Gate Vineyard	5199 West River Rd. Rt. 6	Scottsville, 24590
206	Three Fox Vineyards	10100 Three Fox Lane	Delaplane, Virginia 20144
207	Three Sisters of Shiny Rock	5484 Shiny Rock Rd	Clarksville, 23927
208	Tomahawk Mill Winery	9221 Anderson Mill Road	Chatham, VA 24531
209	Trump Winery	3550 Blenheim Road	Charlottesville, 22902
210	Turk Mountain Vineyards	8982 Dick Woods Rd	Afton, 22920
211	Twin Oaks Tavern Winery	18035 Raven Rocks Rd	Bluemont, Virginia 20135
212	Unicorn Winery	489 Old Bridge Rd	Amisville, VA 20106
213	Valerie Hill Vineyard & Winery	1687 Marlboro Road	Stephens City, 22655
214	Valhalla Vineyards	6500 Mt. Chestnut Rd.	Roanoke, VA 24018
215	Vault Field Vineyards	2953 Kings Mill Rd.	Kinsale, VA 22488
216	Veramar Vineyard	905 Quarry Road	Berryville, VA 22611
217	Veritas Winery	151 Veritas Lane	Afton, Virginia 22920
218	Villa Appalaccia	752 Rock Castle Gorge. DO NOT USE FOR GPS!	Floyd, Virginia 24091
219	Village Winery	40405 Browns Lane	Waterford, Virginia 20197
220	Vincent's Vineyard	2313 East Main St	Lebanon, Virginia 24266

#	Name	Street	City
221	Vint Hill Craft Winery	7150 Lineweaver Road	Vint Hill, 20187
222	Vintage Ridge Vineyard	8517 Maidstone Rd	Delaplane), Virginia 20144
223	Virginia Mountain Vineyards	4204 Old Fincastle Rd	Fincastle, Virginia 24090-3559
224	Virginia Wineworks / Michael Shaps	1781 Harris Creek Way	Charlottesville, Virginia 22902
225	Well Hung Vineyard	Charlottesville, 22903	
226	West Wind Farm Vineyard and Winery	180 West Wind Dr.	Max Meadows, Wythe County, Virginia 24360
227	Weston Farm Vineyard and Winery	206 Harris Creek Rd	Louisa, 23093
228	White Hall Vineyards	5282 Sugar Ridge Rd.	Crozet, Virginia 22932
229	White Oak Mtn Meadery	455 East Store Lane	Chatham, 24531
230	White Rock Vineyards & Winery	2117 Bruno Drive	Goodview, Virginia 24095
231	Wicked Oak Farms & Vineyard	2121 South Pifer Road	Star Tannery, 22654-2236
232	Williamsburg Winery	5800 Wessex Hundred	Williamsburg, Virginia 23185
233	Willowcroft Farm Vineyards	38906 Mt. Gilead Road	Leesburg, Virginia 20175
234	Winding Road Cellars	4289 Leeds Manor Road	Markham, 22643
235	Winery 32	15066 Limestone School Road	Leesburg, 20176
236	Wintergreen Winery	PO Box 648	Nellysford, VA 22958
237	Wisdom Oak Winery	3625 Walnut Branch Lane	North Garden, VA 22959
238	Wisteria Farm & Vineyard	1126 Marksville Rd.	Stanley, Virginia 22851
239	Wolf Gap Vineyard & Winery	123 Stout Road	Edinburg, Virginia 22824
240	Woodland Vineyard	15501 Genito Rd	Midlothian, Virginia 23112
241	Zephaniah Farm Vineyard	19381 Dunlop Mill Road	Leesburg, VA 20175





APPENDIX C: REPORT FROM POTENTIAL WINE CENTER CONSUMERS SURVEY

1. What is your age?

		Response Percent	Response Count
Under 21		0.0%	0
21-24		0.9%	6
25-34		12.2%	86
35-49		21.9%	154
50-64		48.4%	340
65+		16.6%	117
answered question			703
skipped question			0






2. In the last year, have you visited any vineyards, breweries, theaters, museums, galleries, art fairs, food festivals, or attended other cultural events?

		Response Percent	Response Count
Yes		97.6%	685
No		2.4%	17
answered question			702
skipped question			1

3. What is your interest in tasting and learning more about:

	Very	Interested	Somewhat	Not Interested	Rating Average	Rating Count
Wines from around the world	37.0% (239)	40.1% (259)	19.8% (128)	3.1% (20)	1.00	646
Wines from Virginia	76.2% (508)	19.9% (133)	3.1% (21)	0.7% (5)	1.00	667
Microbrewed beers	39.4% (252)	30.5% (195)	18.3% (117)	11.7% (75)	1.00	639
Hard cider	25.9% (164)	25.9% (164)	27.4% (173)	20.7% (131)	1.00	632
Other spirits (e.g. bourbon, single malt whiskey)	25.0% (156)	29.4% (184)	26.4% (165)	19.2% (120)	1.00	625
Artisanal food	54.2% (350)	31.1% (201)	11.5% (74)	3.3% (21)	1.00	646
answered question						669
skipped question						34

4. How often do you drink wine from Virginia?

		Response Percent	Response Count
At least once per week		39.2%	262
Every month or so		41.8%	279
I've tried it, but don't drink it regularly		16.9%	113
Never tried it - but plan to		1.0%	7
Never tried it - don't plan to		1.0%	7
answered question			668
skipped question			35



5. Have you visited any of Virginia's vineyards?

		Response Percent	Response Count
Yes - several different vineyards, several times		81.2%	540
Yes - one vineyard several times		3.2%	21
Yes - once or twice		10.1%	67
Never been - but I'd like to visit		5.0%	33
Never been - not interested		0.6%	4
answered question			665
skipped question			38

6. Please rate the following aspects of your Virginia wine experience:

	Excellent	Good	Average	Poor	Rating Average	Rating Count
Quality of wine	46.7% (294)	45.9% (289)	6.7% (42)	0.8% (5)	1.00	630
Quality of service	56.7% (354)	38.0% (237)	5.0% (31)	0.3% (2)	1.00	624
Quality of overall experience	57.3% (359)	39.4% (247)	3.0% (19)	0.3% (2)	1.00	627
Value (cost vs. experience)	30.7% (193)	47.8% (300)	19.4% (122)	2.1% (13)	1.00	628
answered question						631
skipped question						72






7. Have you visited other major wine producing regions, such as the Napa Valley or Bordeaux?

		Response Percent	Response Count
Yes		60.4%	403
No		39.6%	264
answered question			667
skipped question			36






8. Please rate the following aspects of your experience in wine regions outside of Virginia:

	Excellent	Good	Average	Poor	Rating Average	Rating Count
Quality of wine	67.4% (271)	31.6% (127)	1.0% (4)	0.0% (0)	1.00	402
Quality of service	44.5% (178)	45.8% (183)	9.8% (39)	0.0% (0)	1.00	400
Quality of overall experience	54.4% (218)	40.4% (162)	5.2% (21)	0.0% (0)	1.00	401
Value (cost vs. experience)	21.3% (85)	55.8% (223)	21.3% (85)	1.8% (7)	1.00	400
answered question						402
skipped question						301

9. Would you visit a dynamic Virginia Wine Center where you could sample wine & food products and learn how they're made?

		Response Percent	Response Count
Definitely		69.3%	460
Probably		21.8%	145
Maybe		7.2%	48
Probably not		0.8%	5
Definitely not		0.9%	6
answered question			664
skipped question			39

10. If a Wine Center were to be built in Central Virginia, close to Monticello and beautiful vineyards, how likely would you be to visit?

		Response Percent	Response Count
Definitely		66.4%	441
Probably		25.0%	166
Maybe		6.8%	45
Probably not		0.9%	6
Definitely not		0.9%	6
answered question			664
skipped question			39

11. How interested would you be in the following activities at a Virginia Wine Center?

	Very	Interested	Somewhat	Not Interested	Rating Average	Rating Count
Workshops/talks/classes on various aspects of wine, beer, cider and food	44.4% (292)	33.8% (222)	16.7% (110)	5.0% (33)	1.00	657
Activities/demonstrations (i.e. grape crushes, vine pruning, etc.)	47.7% (312)	35.3% (231)	13.6% (89)	3.4% (22)	1.00	654
Exhibition/short film about Virginia's wine history	37.2% (244)	35.1% (230)	20.4% (134)	7.3% (48)	1.00	656
Tasting Virginia wines and other local products	80.7% (532)	15.5% (102)	2.3% (15)	1.5% (10)	1.00	659
Orientation to Virginia's various wineries, regions, and trails	52.9% (346)	34.9% (228)	9.6% (63)	2.6% (17)	1.00	654
Taking a shuttle to multiple vineyards, cideries, breweries	51.7% (339)	25.0% (164)	14.3% (94)	9.0% (59)	1.00	656
Tasting wines from around the world	41.3% (271)	32.9% (216)	19.1% (125)	6.7% (44)	1.00	656
answered question						664
skipped question						39

12. If visiting the Wine Center, how likely would you be to purchase...

	Definitely	Probably	Maybe	Unlikely	Definitely Not	Rating Average	Rating Count
Membership for discounted workshops, events, products	21.4% (140)	30.8% (202)	33.0% (216)	12.7% (83)	2.1% (14)	1.00	655
Virginia wine, cider, and/or beer	59.5% (393)	31.5% (208)	6.1% (40)	1.5% (10)	1.4% (9)	1.00	660
Tickets to special events like festivals, dinners and celebrity talks	27.0% (178)	35.5% (234)	30.7% (202)	5.3% (35)	1.5% (10)	1.00	659
Specialty/locally produced food	45.2% (298)	41.4% (273)	11.4% (75)	1.2% (8)	0.9% (6)	1.00	660
answered question							663
skipped question							40

13. If the Wine Center offered family friendly activities, would you visit with children?

		Response Percent	Response Count
Definitely		19.7%	128
Probably		18.3%	119
Maybe		18.4%	120
Probably not		24.4%	159
Definitely not		19.2%	125
answered question			651
skipped question			52

14. What is your gender?

		Response Percent	Response Count
Male		37.9%	248
Female		62.1%	406
answered question			654
skipped question			49

15. What is your racial/ethnic background? (select all that apply)

		Response Percent	Response Count
Caucasian		95.2%	613
Hispanic/Latino		1.7%	11
African American		1.2%	8
Asian		1.2%	8
Native American		1.1%	7
Multiracial/Multiethnic		1.1%	7
Other (please specify)			5
answered question			644
skipped question			59

16. What is your annual household income?

		Response Percent	Response Count
Under \$30,000		2.5%	15
\$30,000 - <\$51,000		8.8%	53
\$51,000 - <\$71,000		13.0%	78
\$71,000 - <\$100,000		20.9%	125
\$100,000 - <\$150,000		27.7%	166
Over \$150,000		27.0%	162
answered question			599
skipped question			104


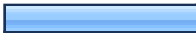


Page 11, Q15. What is your racial/ethnic background? (select all that apply)

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2	white american	Nov 9, 2013 12:38 PM
3	Human	Nov 9, 2013 7:47 AM
4	American	Nov 8, 2013 10:06 PM
5	american	Nov 8, 2013 5:58 PM








APPENDIX D: REPORT FROM WINE INDUSTRY PROFESSIONALS SURVEY





1. Where do you work?

		Response Percent	Response Count
Central Virginia		61.4%	43
Northern Virginia		28.6%	20
Coastal/Tidewater Virginia		2.9%	2
Southwestern Virginia		7.1%	5
DC or Maryland		0.0%	0
Out of State		0.0%	0
Outside the US		0.0%	0
		answered question	70
		skipped question	0


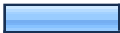



2. What industry do you work in?

		Response Percent	Response Count
Wine		91.3%	63
Cider		1.4%	1
Beer		0.0%	0
Small farm/farm to table		0.0%	0
Artisanal food such as cheese, jams, breads		1.4%	1
Industrial farming		0.0%	0
Factory produced food products		1.4%	1
I do not work with wine, beer or food		4.3%	3
answered question			69
skipped question			1



3. How old are you?

		Response Percent	Response Count
Under 21		0.0%	0
21-34		9.2%	6
35-49		27.7%	18
50-64		46.2%	30
65+		16.9%	11
answered question			65
skipped question			5








4. My current position is (select one)

		Response Percent	Response Count
Owner/partner of existing business		78.5%	51
Manager of existing business		16.9%	11
Board member or senior manager of a wine, beer or food professional organization		1.5%	1
Soon to open my own wine, beer or food business		1.5%	1
Hard worker, but not an owner or senior manager at this time		1.5%	1
		answered question	65
		skipped question	5



5. Does your vineyard/brewery/farm offer a significant public experience?

		Response Percent	Response Count
Yes		93.8%	60
No		6.3%	4
		answered question	64
		skipped question	6



6. What experiences do you regularly offer? (check all that apply)

		Response Percent	Response Count
Tasting experience		98.3%	59
Tours of your production facilities		70.0%	42
Demonstrations		30.0%	18
Informal restaurant/snack bar		36.7%	22
Formal restaurant		8.3%	5
Special event space for parties of more than 100		41.7%	25
Other (please specify)		31.7%	19
		answered question	60
		skipped question	10



7. Are you interested in having more people visit your property?

		Response Percent	Response Count
Yes		95.3%	61
No		4.7%	3
		answered question	64
		skipped question	6

8. Do you already have the facilities to support increased visitation?

		Response Percent	Response Count
Yes		90.2%	55
No		9.8%	6
answered question			61
skipped question			9



9. Are you in the process of building new or expanding existing facilities to accommodate the public?

		Response Percent	Response Count
Yes		52.5%	32
No		47.5%	29
comments			7
answered question			61
skipped question			9







10. Why not?

	Response Count
	3
answered question	3
skipped question	67

11. Do you currently participate in networking and professional development?

		Response Percent	Response Count
Yes		82.3%	51
No		17.7%	11
answered question			62
skipped question			8

12. What activities are you personally currently involved with? (check all that apply)

		Response Percent	Response Count
Membership in a professional organization		94.0%	47
Continuing education classes		48.0%	24
Degree program		6.0%	3
Internship/apprenticeship		2.0%	1
Social activities through personal connections		88.0%	44
Please list the specific activities (e.g. name of organization, types of classes, etc.)		36.0%	18
answered question			50
skipped question			20

13. Why not?

	Response Count
	4
answered question	4
skipped question	66

14. What activities do you think a Virginia Wine Center should offer to the public?

	Must Have	Important	Somewhat Important	Not That Important	No Way	Rating Average	Rating Count
Tastings of wine, cider, beer and food	59.3% (35)	23.7% (14)	8.5% (5)	1.7% (1)	6.8% (4)	1.00	59
Organized trips/tours of vineyards	25.4% (15)	30.5% (18)	15.3% (9)	20.3% (12)	8.5% (5)	1.00	59
Wine and food festivals with local chefs	25.4% (15)	30.5% (18)	27.1% (16)	10.2% (6)	6.8% (4)	1.00	59
Opportunities to buy local wine, cider, beer and food	55.0% (33)	20.0% (12)	15.0% (9)	3.3% (2)	6.7% (4)	1.00	60
Expos of products by local artists, craftsmen and designers	19.3% (11)	26.3% (15)	29.8% (17)	17.5% (10)	7.0% (4)	1.00	57
Dinners and special ticketed events	13.3% (8)	41.7% (25)	25.0% (15)	15.0% (9)	5.0% (3)	1.00	60
Demonstrations and interactive activities	31.0% (18)	34.5% (20)	29.3% (17)	1.7% (1)	3.4% (2)	1.00	58
Formal classes/workshops to inspire and build appreciation	32.2% (19)	42.4% (25)	18.6% (11)	5.1% (3)	1.7% (1)	1.00	59
An exhibition about Virginia's wine history	55.9% (33)	27.1% (16)	10.2% (6)	5.1% (3)	1.7% (1)	1.00	59

Other (please specify) 3

answered question	61
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15. What activities would you - as a professional - want a Virginia Wine Center to offer?

	Must Have	Important	Somewhat Important	Not that important	No Way	Rating Average	Rating Count
Research lab & experimental vineyard	12.1% (7)	36.2% (21)	20.7% (12)	24.1% (14)	6.9% (4)	1.00	58
Demos/lectures by peers & industry leaders	29.8% (17)	43.9% (25)	19.3% (11)	3.5% (2)	3.5% (2)	1.00	57
Sales outlet that carries your product along with others	34.4% (21)	24.6% (15)	26.2% (16)	11.5% (7)	3.3% (2)	1.00	61
Dedicated rental space to sell your product	20.7% (12)	10.3% (6)	25.9% (15)	36.2% (21)	6.9% (4)	1.00	58
Networking/social events w/ other industry professionals	29.3% (17)	36.2% (21)	25.9% (15)	5.2% (3)	3.4% (2)	1.00	58
Classes for credit (in partnership w/ an existing college)	17.2% (10)	41.4% (24)	22.4% (13)	15.5% (9)	3.4% (2)	1.00	58
Continuing education/certificate classes (in partnership w/ an existing college)	17.9% (10)	44.6% (25)	21.4% (12)	12.5% (7)	3.6% (2)	1.00	56
Multi-purpose spaces for rentals/conferences	15.5% (9)	34.5% (20)	27.6% (16)	17.2% (10)	5.2% (3)	1.00	58
					Other (please specify)		3
answered question							61
skipped question							9



16. Which classes would be most interesting to you (for you or your staff)? Rank your top three.

	1	2	3	Rating Average	Rating Count
Viticulture	40.4% (19)	38.3% (18)	21.3% (10)	1.00	47
Enology	40.9% (18)	43.2% (19)	15.9% (7)	1.00	44
Beer making	0.0% (0)	40.0% (2)	60.0% (3)	1.00	5
Cider making	25.0% (1)	0.0% (0)	75.0% (3)	1.00	4
Business development and marketing	36.7% (11)	23.3% (7)	40.0% (12)	1.00	30
Hospitality training	27.3% (6)	22.7% (5)	50.0% (11)	1.00	22
Cheese making	0.0% (0)	50.0% (2)	50.0% (2)	1.00	4
Artisanal food production	40.0% (2)	0.0% (0)	60.0% (3)	1.00	5
			Other (please specify)		5
answered question					57
skipped question					13

17. How strongly do you agree with the following statements?

	Definitely	Probably	Maybe	Unlikely	Definitely Not	Rating Average	Rating Count
Virginia-based wine, beer and artisanal food producers would benefit from a high-profile Wine Center dedicated to celebrating Virginia products.	50.0% (30)	21.7% (13)	18.3% (11)	6.7% (4)	3.3% (2)	1.00	60
From time to time, I would collaborate with the Wine Center to develop programs like demos or lectures.	34.4% (21)	36.1% (22)	13.1% (8)	14.8% (9)	1.6% (1)	1.00	61
I would be interested in corporate membership of the Wine Center if benefits included professional development, promotional opportunities, and discounted classes/events.	26.7% (16)	18.3% (11)	33.3% (20)	16.7% (10)	5.0% (3)	1.00	60
I am concerned that a Wine Center would compete with existing businesses.	11.9% (7)	8.5% (5)	23.7% (14)	39.0% (23)	16.9% (10)	1.00	59
I would use the Wine Center as a resource to expand my current skill set and learn about new aspects of the wine, beer and food industry.	29.5% (18)	29.5% (18)	21.3% (13)	14.8% (9)	4.9% (3)	1.00	61
I would send my employees to classes to improve or expand their current skills.	39.3% (24)	27.9% (17)	19.7% (12)	6.6% (4)	6.6% (4)	1.00	61
					answered question		61
					skipped question		9

18. Do you think the Wine Center should celebrate the story of Virginia's wine industry, including its early beginnings?

		Response Percent	Response Count
Yes		91.7%	55
No		8.3%	5
answered question			60
skipped question			10

19. Any additional thoughts on a potential Virginia Wine Center and what it will take to make it successful?

	Response Count
	23
answered question	23
skipped question	47

Page 7, Q6. What experiences do you regularly offer? (check all that apply)

1	Hiking, picinicing, etc	Nov 15, 2013 4:28 PM
2	main winery is used for events of over 100; food is only wrapped cheeses, meats,crackers...	Nov 15, 2013 11:52 AM
3	Music venue	Nov 15, 2013 11:29 AM
4	Vineyard Tours	Nov 14, 2013 2:21 PM
5	New event space by October '14	Nov 10, 2013 10:06 AM
6	Artisanal Butcher Shop and Wine Shop w/ tastings	Nov 10, 2013 9:01 AM
7	2000 customers a weekend visitation.	Nov 8, 2013 6:15 PM
8	picnics, parties, special events, festivals, etc	Nov 8, 2013 6:55 AM
9	Hotel	Nov 7, 2013 11:32 AM
10	Events for 40 inside; up to 200 outside. Concerts, weekly live music + lunch	Nov 7, 2013 11:32 AM
11	wine dinners; cooking demos; small weddings < 75 people; other small meeting space	Nov 7, 2013 11:24 AM
12	Wine Maker's dinneers, music, etc.	Nov 7, 2013 11:03 AM
13	host events monthly from February-November music, food, fun	Nov 7, 2013 10:52 AM
14	festival	Nov 7, 2013 9:47 AM
15	Historic house tour	Nov 7, 2013 9:39 AM
16	Public Interest Discussions/Music	Nov 7, 2013 9:36 AM
17	Tour of LEED certified Green building	Nov 7, 2013 9:26 AM
18	educational workshops	Nov 7, 2013 9:24 AM
19	Wine acessories and Gifts	Nov 7, 2013 9:21 AM

Page 10, Q9. Are you in the process of building new or expanding existing facilities to accommodate the public?

1	Addition of outside gardens and renovation of event space	Nov 15, 2013 3:42 PM
2	New production/event space	Nov 10, 2013 10:07 AM
3	larger tasting room, indoor social space	Nov 7, 2013 7:11 PM
4	not yet	Nov 7, 2013 2:14 PM
5	Under consideration depending on traffic. Plenty of space for expansion; watching for / anticipating need	Nov 7, 2013 11:32 AM
6	am considering it	Nov 7, 2013 10:52 AM
7	Presently working on plans with an architect	Nov 7, 2013 9:40 AM

Page 11, Q10. Why not?

1	It depends on the purpose. We are close to full capacity now	Nov 7, 2013 11:25 AM
2	Only have a vineyard on our property, no tasting room, love our privacy!	Nov 7, 2013 10:47 AM
3	Why?	Nov 7, 2013 9:34 AM

Page 13, Q12. What activities are you personally currently involved with? (check all that apply)

1	Bedford Wine Trail, Artisan Trail	Nov 15, 2013 4:29 PM
2	Monticello Wine Trail, Appellation Trail, VWA, VVA, occasional PVCC classes, VT eonology and viticulture meetings.	Nov 15, 2013 11:53 AM
3	Virginia Wineries Association Monticello Wine Trail Appellation Trail (wine trail organization) Virginia Vineyards Association	Nov 15, 2013 11:32 AM
4	VVA, VWA Board Member, Wine Board Member	Nov 13, 2013 1:51 PM
5	Virginia Vineyards Assoc., Loudoun Wine Growers Assoc., VT wine makers Round table, Loudoun Wineries Assoc., Visit Loudoun, Working Tasting Room	Nov 10, 2013 10:12 AM
6	Board CoC Board VTC Board of local wine council	Nov 8, 2013 6:16 PM
7	Loudoun Winegrowers Assn Virginia Vineyards Assn Loudoun Wineries Assn Sensory analysis classes by Virginia Tech	Nov 8, 2013 12:56 PM
8	VVA	Nov 7, 2013 10:19 PM
9	Mont wine trail, nelson151	Nov 7, 2013 6:58 PM
10	wine grower association, honey bee association, young mentorships group	Nov 7, 2013 3:48 PM
11	on the board of The Frontier Culture Museum On the board of The community Foundation On the board of the Staunton Performing Arts Council. serve on Staunton Tourist Advisory Board	Nov 7, 2013 3:44 PM
12	Various VA wine groups; committees, seminars. Also, local business and political orgs (e.g., chamber, etc.)	Nov 7, 2013 11:33 AM
13	Chamber of Commerce Artisanal Trail VWA	Nov 7, 2013 11:17 AM
14	Chamber of Commerce, several Lake Anna Business Partnership Wine Trail Multi facet Trail (beer, wine, distilled spirits)	Nov 7, 2013 10:54 AM
15	The whole alphabet soup	Nov 7, 2013 9:56 AM
16	Vva, vwa, vwc	Nov 7, 2013 9:44 AM
17	Virginia Wineries Association Virginia Vineyards Association Virginia Wine Council Nelson County Chamber of Commerce Virginia FarmBureau Virginia AgriBusiness Council	Nov 7, 2013 9:37 AM
18	Board membership in two industry boards	Nov 7, 2013 9:25 AM

Page 14, Q13. Why not?

1	Busy	Nov 8, 2013 10:30 AM
2	Don't have time	Nov 7, 2013 8:28 PM
3	Busy expanding business	Nov 7, 2013 10:12 AM
4	Live very rural and stay busy	Nov 7, 2013 9:22 AM

Page 15, Q14. What activities do you think a Virginia Wine Center should offer to the public?

1	none of these	Nov 8, 2013 10:40 AM
2	Must include mead in survey.	Nov 7, 2013 3:57 PM
3	Local food, cheese, farm products. Cooking classes, wine pairing, guest chef	Nov 7, 2013 9:58 AM

Page 15, Q15. What activities would you - as a professional - want a Virginia Wine Center to offer?

1	More exposure to country wines (various fruits & berries.)	Nov 7, 2013 7:17 PM
2	Involve local food professionals	Nov 7, 2013 9:58 AM
3	Too many outlets are not sustainable	Nov 7, 2013 9:33 AM

Page 15, Q16. Which classes would be most interesting to you (for you or your staff)? Rank your top three.

1	Country Wine Making (various fruits & berries)	Nov 7, 2013 7:17 PM
2	mead (honey wine)	Nov 7, 2013 3:57 PM
3	People travel for cooking/wine classes. Good way to get more tourists here	Nov 7, 2013 9:58 AM
4	Too many outlets are not sustainable	Nov 7, 2013 9:33 AM
5	Clases on the changing laws	Nov 7, 2013 9:27 AM

Page 15, Q19. Any additional thoughts on a potential Virginia Wine Center and what it will take to make it successful?

1	Even if the wine center "competes" with wineries, if it is well done it will increase tourism enough so that the pie will grow	Nov 15, 2013 11:57 AM
2	It's a great idea that should involve everyone, and particularly establish Central Virginia as Virginia's Wine Country.	Nov 15, 2013 11:31 AM
3	Location Near Wineries and Customer base.	Nov 10, 2013 10:18 AM
4	We now have almost thirty wineries in Fauquier County, most of them very serious about producing better and better wines. Fauquier County would make a great venue for this center.	Nov 10, 2013 9:06 AM
5	I have purchased "Americaswinecountry.com" I STRONGLY advocate that we: 1. Brand the center's activities using this marketing concept, 2. Find a wealth person or company to fund the center with naming rights, 3. Locate the center relatively close to Dulles International - i.e. Loudoun of - my preference - Fauquier. I am willing to search for significant funding in exchange locatinmg the center in Fauquier County.	Nov 8, 2013 6:21 PM
6	For those in the industry, it would have to offer something they can't get now, like classes and other professional development. For consumers, part of the draw to going to vineyards and wineries is getting out in the country and experiencing the whole thing. If the wine center is selling products, will it be just a Virginia-specific store? In some ways it's more convenient, but it can't compete with the whole agri-tourism experience.	Nov 8, 2013 1:05 PM
7	yeah, you need 4 of them. One in NW, NE, SW, and SE Virginia. If you do one then you limit 95% of the state because of distance. Just don't even build one.	Nov 8, 2013 7:00 AM
8	great concept	Nov 7, 2013 10:24 PM
9	Locate centrally, like Albemarle Co.	Nov 7, 2013 7:31 PM
10	Why does something called the Wine Center even ask about beer offerings in a survey? Don't try to capitalize on the draw of "wine" and then throw in a bunch of other unrelated products.	Nov 7, 2013 7:02 PM
11	Put it in Loudoun	Nov 7, 2013 6:24 PM
12	must include mead is this survey. (Yes there are only four (4) of us but the interest is even greater.) Stonehouse Meadery, Purcellville, VA 20132	Nov 7, 2013 3:57 PM
13	I think it needs to be easily accessible with parking.	Nov 7, 2013 3:24 PM
14	Great idea. I think we're still 10 years away from this project. Let's use public funds to encourage more planting of vineyards instead. That is the number 1 priority of the industry. We cannot grow as an industry and cannot make a significant impact on a national basis without serious investment in viticulture. VA viticulture must reach the point were it can economically sustain the demand for sales of VA wine and we are nowhere near that goal. Patrick Duffeler II The Williamsburg Winery Ltd.	Nov 7, 2013 11:38 AM
15	The geography is key. Beyond key, really. I already feel like I know where it	Nov 7, 2013 11:35 AM

Page 15, Q19. Any additional thoughts on a potential Virginia Wine Center and what it will take to make it successful?

would be but it must must must promote Virginia's wine industry from all areas or it will be maligned, ignored, or worse.

16	Frankly, I'm not sure it's such a good idea but it warrants further research/investigation.	Nov 7, 2013 11:29 AM
17	You asked where I worked but nowhere did you offer the Shenandoah Valley or western Virginia as an option. Do you suffer from the problem of not seeing past Charlottesville as many in Richmond do?	Nov 7, 2013 11:09 AM
18	Location? funding?	Nov 7, 2013 10:23 AM
19	The biggest question/concern in my mind is "where would this center be located." The top Virginia wine regions (Loudoun County and Charlottesville area) are so spread out that a center located in one location would not be convenient for those located in the other.	Nov 7, 2013 10:07 AM
20	"membership" is a red flag. If this is a locally funded and operated enterprise great, but I have little interest in joining yet another association/cooperative in order to potentially add to marketing.	Nov 7, 2013 10:04 AM
21	I think the most value would be as a high end tourist draw. Beautiful space, great food and wine, cooking, food, cheese, pastry classes. Not so much a resource for the industry but a way to build the reputation of Virginia food and wine. Spread the word about our wine beyond the state borders. The center should be a destination for US and international visitors. We already have pvcc if we want to take professional development classes. Why duplicate?	Nov 7, 2013 9:58 AM
22	Virginia wine industry is very diverse: mountains, coastal, north and south. I do not see any advantage to a centralized facility. Please support and enhance the universities programs, which are accomplishing great things for the industry.	Nov 7, 2013 9:33 AM
23	This survey is worded in a way to support positive views on this center. I'm concerned that visitors have only so many "visits" in them and this will reduce visitors to nearby wineries. Also concerned on how the center can portray a balanced view of VA wine. As seen in this survey, this center has a muddled mission—is it education for the industry? If so, we already have vehicles for this in place. Is this tourism? Education for consumers? If so, are consumers really interested in education. Research seems to say tourists want to eat and drink and visit wineries in pretty places. Everybody in VA will say "yes" to the history of wine connection, but research shows that "history" is not a powerful driver of tourism. I would not dwell on that connection with VA wine.	Nov 7, 2013 9:31 AM

APPENDIX E: ADDITIONAL SURVEY COMMENTS SUBMITTED VIA EMAIL

The following three comments regarding the wine center were submitted via email by three survey takers:

- Survey about Wine Center did not have a space to put additional thoughts. Would be interested in you integrating some aspect of landscaping/plants/care of grapevines/lecture by Peter Hatch....recorded presentation would be fine.
- I am concerned about the impact to each of the wineries in the central Virginia area if there is a one stop place to experience the wines offered here. If the local wineries experience any decrease in visitors as a result of a central wine experience, this is a terrible idea. Visitors return time and again to experience the different wineries--it is good for our economy.
- I took the survey, but didn't have the opportunity to say that part of the wine "experience" is actually visiting and tasting AT various wineries. We have visited Early Mountain Winery and that was delightful. We go for lunch and the view...not their wine. But I am not sure, unless I happened to drive by it, that I would make a point of visiting a Wine "Center". We would rather visit the actual winery. That may be because we have visited global wineries and west coast wineries (from WA to CA) and find them varied and extremely interesting.